

Management of collaborative TB/HIV activities:

Training for managers at the national and subnational levels

Guide for the course director



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Geneva, 2005

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The following people also provided technical input:

Akiiki Bitalabeho, Department of HIV/AIDS, WHO
Caterina Casalini, Ministry of Health, Ethiopia
Rhehab Chimzizi, Ministry of Health, Malawi
Nickolas De Luca, United States Centers for Disease Control and Prevention, USA
Anthony Harries, Ministry of Health, Malawi
Haileyesus Getahun, Stop TB Department, WHO
Massimo Ghidinelli, WHO Country Office for Cambodia
Daniel Kibuga, WHO Regional Office for Africa
Fabio Luelmo, consultant, the Netherlands
Paul Nunn, Stop TB Department, WHO
Rose Pray, Stop TB Department, WHO
Gilles Pומרol, Department of HIV/AIDS, WHO
Alasdair Reid, Stop TB Department, WHO
Felix Salaniponi, Ministry of Health, Malawi
Igor Toskin, Stop TB Department, WHO
Jan van den Hombergh, WHO Country Office for Ethiopia
Marco Vitoria, Department of HIV/AIDS, WHO

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Guide for the course director

1. Introduction

1.1 Target population for this guide

This guide is for the course director of the course: *Management of collaborative TB/HIV activities: training for managers at the national and subnational levels*.

This guide explains how to organize the course:

- the target population, purpose, methods and materials and learning objectives of the course;
- how to prepare for the course: planning and administration, selection of facilitators, materials and other supplies needed and the schedule;
- how to train facilitators; and
- how to direct the course.

1.2 Purpose of the training course

WHO designed the training course with the goal of further developing the necessary skills to plan and implement collaborative TB/HIV activities based on the WHO-recommended strategies for controlling tuberculosis (TB) and HIV/AIDS.

Section 1.4 of this guide lists the specific learning objectives.

This course is designed for TB and HIV managers operating at a national or subnational level who are responsible for planning, organizing, implementing and evaluating activities within TB control programmes and/or HIV/AIDS programmes and for implementing collaborative TB/HIV activities.

The manager at the national or subnational level is usually a physician. He or she works at the health ministry at a national or subnational level, within the national TB control programme or national HIV/AIDS programme. Usually he or she does not have clinical duties, the job being primarily administrative and managerial. Although the manager must be thoroughly familiar with clinical guidelines for the national TB control programme and/or national HIV/AIDS programme, he or she is primarily responsible for enabling and monitoring the implementation of these guidelines rather than actually managing treatment.

This is why this course does not teach the clinical skills and knowledge needed to detect and treat cases of TB or HIV/AIDS at the health facility level. These skills and knowledge are taught in other courses.¹

¹ *Management of tuberculosis – training for health facility staff*. Geneva, World Health Organization, 2003 (WHO/CDS/TB/2003.313).
IMAI interim guidelines for first-level facility health workers. Geneva, World Health Organization, 2004 (WHO/CDS/IMAI/2004.1 to 4).

1.3 Course methods and materials

This course uses a variety of methods of instruction, including presentations, exercises, discussions, exchange of experience among facilitators and participants and a field visit to a local health facility offering TB and HIV/AIDS services. Practice, whether in problem-solving exercises, discussions, exchange of experience among facilitators and participants or in the health facility, is considered a critical element of instruction.

- Presentations are designed to introduce the exercises.
- Exercises are based on data from Fictitia, an imaginary country completing the expansion phase of DOTS and facing the effects of a growing HIV/AIDS epidemic. Annex 1 of the participants' manual is a concise background document including the map of the country, its infrastructure, epidemiological and financial data as well as the exercises.
- Other interactive activities are conducted to facilitate the full comprehension of new information and the development of skills. Presentations and discussions are based on selected country experiences (such as Malawi) and on the participants' own experiences.
- A field visit is organized to a health facility providing services for people with TB and HIV. Senior counsellors and health care staff from the health facility facilitate the visit.

The course materials contain available data up to October 2005.
The information should be updated at the time of the training
and adapted to the course needs

The training course includes the units listed below.

Introduction to the course	Unit 1
How to prepare a plan for implementing collaborative TB/HIV activities	Unit 2
Epidemiology	Unit 3
Principles for controlling TB and HIV/AIDS	Unit 4
The DOTS strategy for controlling TB	Unit 5, part 1
Clinical management of TB.....	Unit 5, part 2
Universal access to antiretroviral therapy	Unit 6, part 1
Clinical management of HIV/AIDS	Unit 6, part 2
Drug management for controlling TB and HIV/AIDS	Unit 7
The interim policy on collaborative TB/HIV activities.....	Unit 8

Recording and reporting for the implementation of collaborative TB/HIV activities	Unit 9
Surveillance of HIV prevalence among people with TB disease	Unit 10
Human resource development for implementing collaborative TB/HIV activities	Unit 11
Monitoring and evaluating the implementation of collaborative TB/HIV activities	Unit 12
Costing and budgeting for the implementation of collaborative TB/HIV activities	Unit 13
Case study on delivering services for TB and HIV/AIDS – the example of Malawi.....	Unit 14
Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS	Unit 15
Individual finalization of plans for implementing collaborative TB/HIV activities	Unit 16
Discussion of plans for implementing collaborative TB/HIV activities	Unit 17
Course evaluation	Unit 18

In the participants’ manual, Annex 1 includes the background document on Fictitia and Annex 2 a list of abbreviations used in the course.

Participants are led and assisted by facilitators as they work through the course units, individually or in small groups. The facilitators are not lecturers, as in a traditional classroom. Their role, besides introducing the unit and the group work, includes answering questions, providing individual feedback on plans and leading discussions.

The units provide the basic information to be learned. They are designed to help each participant develop the specific skills necessary for planning and implementing collaborative TB/HIV activities, based on the WHO-recommended strategies for controlling TB and HIV/AIDS and the interim policy on collaborative TB/HIV activities.

Each participant discusses any problems or questions with facilitators and receives prompt feedback on problem-solving exercises. Feedback includes reviewing and discussing the plan with the participant.

1.4 Learning objectives

Each unit of the participants’ manual provides the necessary information for participants on objectives, methods and materials. Slides and exercises are also reported at the end of each unit.

The facilitator guide provides instructions on how facilitators should manage each unit. In each unit, procedures and feedback are summarized first and then explained in detail. The learning objectives of each unit are summarized below.

Unit 1: Introduction to the course

1. To provide participants with an overview of the course and its objectives
2. To introduce participants and facilitators
3. To describe the course methods and to review the course materials
4. To review course evaluation by participants
5. To set the tone of the course as informal, participatory and practical

Unit 2: How to prepare a plan for the implementing collaborative TB/HIV activities

1. To explain the importance of developing a national plan for implementing collaborative TB/HIV activities
2. To discuss the structure and list the components of a plan for implementing collaborative TB/HIV activities
3. To prepare a plan, following the different topics and units presented during the course

Unit 3: Epidemiology

1. To describe the epidemiology of TB, HIV/AIDS and TB/HIV at the global, regional and national levels
2. To discuss the implications of the epidemiological situation for developing collaborative TB/HIV activities at the country level (priorities, mechanisms, steps and procedures)

Unit 4: Principles for controlling TB and HIV/AIDS

1. To describe principles, priorities, transmission patterns, interventions, indicators and targets related to controlling TB
2. To describe the main elements of prevention and care in controlling HIV/AIDS
3. To discuss the implications of these principles for implementing collaborative TB/HIV activities

Unit 5, part 1: The DOTS strategy for controlling TB

1. To describe the DOTS strategy (the WHO-recommended strategy for controlling TB)
2. To discuss the implications of the strategy for implementing collaborative TB/HIV activities

Unit 5, part 2: Clinical management of TB

1. To describe how the clinical management of TB is organized
2. To state the principles of diagnosis, treatment and case management related to controlling TB

3. To discuss the implications of these principles for implementing collaborative TB/HIV activities

Unit 6, part 1: Universal access to antiretroviral therapy

1. To describe universal access to antiretroviral therapy (rationale, core premises and principles, targets, objectives, and components of its strategic framework)
2. To discuss the implications of universal access to antiretroviral therapy for implementing collaborative TB/HIV activities

Unit 6, part 2: Clinical management of HIV/AIDS

1. To describe how the clinical management of HIV/AIDS is organized
2. To review the clinical and laboratory eligibility criteria for antiretroviral therapy, antiretroviral drug regimens and side-effects
3. To discuss the implications of these principles for implementing collaborative TB/HIV activities

Unit 7: Drug management for controlling TB and HIV/AIDS

1. To discuss the various aspects of TB and HIV drug management using a logical framework
2. To identify the differences between the procurement practices for TB and HIV/AIDS drugs
3. To identify gaps and priorities in the procurement of TB and HIV/AIDS drugs and to propose solutions to facilitate drug management in implementing collaborative TB/HIV activities

Unit 8: The interim policy on collaborative TB/HIV activities

1. To describe the main elements of the interim policy on collaborative TB/HIV activities
2. To discuss the main problems, constraints and opportunities found in implementing collaborative TB/HIV activities at the country level

Unit 9: Recording and reporting for the implementation of collaborative TB/HIV activities

1. To describe how recording and reporting is organized for controlling TB
2. To describe how recording and reporting is organized for controlling HIV/AIDS
3. To discuss relevant country experiences on TB/HIV recording and reporting and how existing recording and reporting systems can be harmonized to serve the implementation of collaborative TB/HIV activities.

Unit 10: Surveillance of HIV prevalence among people with TB disease

1. To describe surveillance of HIV prevalence among people with TB disease
2. To discuss the main problems, constraints and opportunities for implementing coordinated TB/HIV surveillance

Unit 11: Human resource development for implementing collaborative TB/HIV activities

1. To describe the overall goal for human resource development for implementing collaborative TB/HIV activities and the strategies to reach and sustain this goal
2. To describe the elements of a human resource development plan for implementing collaborative TB/HIV activities
3. To identify priorities and propose solutions to strengthen human resource development for implementing collaborative TB/HIV activities in Fictitia

Unit 12: Monitoring and evaluating the implementation of collaborative TB/HIV activities

1. To describe the role of monitoring and evaluating the implementation of collaborative TB/HIV activities
2. To describe the elements of monitoring and evaluating the implementation of collaborative TB/HIV activities
3. To plan the monitoring and evaluation of the implementation of collaborative TB/HIV activities

Unit 13: Costing and budgeting for the implementation of collaborative TB/HIV activities

1. To analyse the financial situation of a national TB control programme or national HIV/AIDS programme
2. To prepare a draft budget for implementing collaborative TB/HIV activities

Unit 14: Case study on delivering services for TB and HIV/AIDS – the example of Malawi

1. To analyse the organization of collaborative TB/HIV activities in a real country (Malawi)
2. To review and comment on the experience and materials (plans, guidelines, manuals and forms) used in a selected country with experience in implementing collaborative TB/HIV activities
3. To analyse the implementation of collaborative TB/HIV activities in the selected country and compare it with the experience (if any) of one's own country

Unit 15: Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS

1. To conduct a field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS
2. To describe the organization of TB and HIV/AIDS services, including laboratory, recording and reporting and possible links between TB and HIV services
3. To discuss opportunities to improve coordination between TB and HIV/AIDS services in the health facility visited and in participants' own countries

Unit 16: Individual finalization of plans for implementing collaborative TB/HIV activities

1. To review the contents of the individual draft plan for collaborative TB/HIV activities based on what has been learned in previous units
2. To complete the draft plan for collaborative TB/HIV activities

Unit 17: Discussion of plans for implementing collaborative TB/HIV activities

1. To review and discuss plans for implementing collaborative TB/HIV activities
2. To identify the strengths and weaknesses of the individual draft plans to be improved later

Unit 18: Course evaluation

1. To finalize individual plans for implementing collaborative TB/HIV activities
2. To fill out an evaluation questionnaire (course evaluation form, Document 1.2/18.1)
3. To synthesize verbally their opinions about the course

The order of units in the course has been planned carefully. For example, it is helpful to discuss the topics described in earlier units (such as epidemiology, principles for controlling TB and HIV/AIDS, DOTS strategy, universal access to antiretroviral therapy, clinical management of TB and HIV/AIDS, drug management and recording and reporting) before being asked to finalize the plan. For the same reason, Unit 16 (individual finalization of plans for implementing collaborative TB/HIV activities) and Unit 17 (discussion of plans for implementing collaborative TB/HIV activities) are placed at the end of the course.

2. Preparing for the course

Careful planning and strong administrative support are essential before, during and after the course. This section describes the necessary plans and arrangements for the course. A suggested schedule for the course (matrix and agenda) is provided at the end of section 2.5.

2.1 Checklist for planning and administrative arrangements

As the course director, you may not be directly responsible for all the items on this checklist, but you can ensure that appropriate arrangements are made or you can assign someone responsibility for making them. Arrangements may not be listed in the exact order in which they will be made. Feel free to write in any additional reminders. Although the time necessary to prepare for the course may vary from country to country, it is recommended to start planning all administrative arrangements reasonably well in advance (such as three months before the training course starts).

Initial planning of the course

1. ____ General location of course selected. The location must have adequate classroom facilities and lodging if participants do not live in the area (see item 8 on this checklist). The course will include a field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS; suitable facilities must be accessible in the area. (Section 2.6 describes the field visit.)
2. ____ Time frame identified for giving the course. The entire course should be given in a one-week training session. The recommended agenda should be adapted to the country-specific needs.
3. ____ Adequate number of copies of course materials obtained.
4. ____ Availability of facilitators assessed. Are trained facilitators available, or do you need to train new facilitators for this course? (If this course is being organized the first time, see section 3 to organize three days of facilitator training). For further information on facilitators, see item 7 on this checklist.
5. ____ Specific dates selected for course and facilitator training. The matrix provided in section 2.5 indicates the time required for each unit as well as for the entire course.
 - a. ____ 5.5 calendar days allowed for the course.
 - b. ____ Three days (plus at least one day off) allowed for facilitator training.
 - c. ____ Course director available 1–2 days before facilitator training or before the course and during all the facilitator training and course.

6. ____ Letters sent to the appropriate office asking that office to identify participants (TB and HIV managers operating on a national or subnational level) for training. The letter:
- a. ____ announces the course, *Management of collaborative TB/HIV activities: training for managers at the national and subnational levels*, and explains the purpose of the course;
 - b. ____ clearly states the number of participants to attend the course and that these should be individuals who have responsibility for planning, organizing, implementing and evaluating activities of TB control programmes and/or HIV/AIDS programmes;
 - c. ____ states the time required for attending the course;
 - d. ____ states that participants who complete the entire course will receive a certificate;
 - e. ____ describes the location and dates of the course;
 - f. ____ states the date by which course participants should be nominated and the person to whom names should be sent; and
 - g. ____ clearly states the language and reading skills required and stresses that the course is challenging and requires hard work.
7. ____ Facilitators selected and invited (see section 2.2, Criteria for selecting facilitators).
- a. ____ Ensure that there will be at least one facilitator for every 5–8 participants expected to attend the course. Ideally, for a recommended number of 15–16 participants, three facilitators plus the course director are needed for the entire duration of the training course.
 - b. ____ Ensure that facilitators will attend all facilitator training and the course. Even if facilitator training is not needed (such as if the same team of facilitators attended training previously), facilitators should arrive in time to meet one another and arrange classrooms before the course.
8. ____ Precise locations selected and reserved for classrooms and lodging. (To minimize transport needed, classrooms should be within easy walking distance of the lodging and easy travelling distance of any health facilities to be visited.) The selection should be based on the availability of:
- a. ____ adequate lodging (if needed) for all facilitators and participants;
 - b. ____ accessibility to health facilities to be visited;
 - c. ____ convenient meal service;

- d. ____ a large room for seating all participants, facilitators and visitors to the course (needed only for the course and not for facilitator training);
 - e. ____ smaller rooms for working groups of 4–5 people plus separate space for individual consultations (only one during facilitator training and one for each working group during the course); for example, for 16 participants, four groups of four participants can be formed, and at least three small rooms are needed since one group can work in the classroom;
 - f. ____ tables, chairs, adequate lighting and a blackboard or flipchart stand with paper for each of these rooms; and
 - g. ____ a separate room for the secretariat.
9. ____ List compiled of the TB and HIV managers to be invited to participate in the course.
 10. ____ Letters of invitation sent out to selected participants. The letters:
 - a. ____ briefly describe the purpose and organization of the course;
 - b. ____ state the desired arrival and departure times for participants; and
 - c. ____ describe the arrangements for travel and per diem payments.
 11. ____ Course presentations updated and adapted to the course needs.
 12. ____ Arrangements made for an administrative assistant to be available to deal with administrative tasks 2–3 days before the course (or facilitator training) begins. See the next parts of this checklist for the administrative tasks. Throughout the course, the administrative assistant will need to ensure that things go smoothly and that the work of facilitators and participants is not unduly interrupted. This person may also need to work an extra day after the course to pack up the remaining materials and pay bills.
 13. ____ Travel authorization, if needed, sent to facilitators and participants.
 14. ____ Course completion certificate designed and sufficient copies printed (to be signed and awarded to all participants and facilitators at the end of the course).
 15. ____ Arrangements made for providing necessary supplies for classroom activities (section 2.3 lists the necessary materials and supplies).
 16. ____ Arrangements made for sending or transporting necessary materials and supplies to the course location.

At the course location, before facilitator training or briefing begins (if applicable):

1. ____ Adequate lodging arrangements confirmed for all facilitators.
2. ____ Arrangements made for receiving and orienting facilitators on arrival.
3. ____ Arrangements confirmed for rooms for conducting facilitator training or briefing:
 - a. ____ one room for conducting facilitator training or briefing (with the characteristics listed in item 24b):
 - b. ____ one room for an administrative assistant with space for storing modules, forms and other supplies, available during both facilitator training and the course; and
 - c. ____ one overhead projector and/or video-projector.
4. ____ A schedule for facilitator training based on the suggested schedule in this guide (see section 3.2: Preparing a schedule for facilitator training).
5. ____ Sufficient copies made of registration forms, schedule for facilitator training etc. for use during facilitator training.
6. ____ On arrival, facilitators registered and given a schedule and course materials for facilitator training.

Section 3 describes how to conduct a facilitator training session.

At the course location, before the course begins

1. ____ Adequate lodging arrangements confirmed for all facilitators and participants.
2. ____ Arrangements made for receiving and orienting facilitators and participants at the course location.
3. ____ Arrangements confirmed for adequate rooms for conducting the course:
 - a. ____ a large room available on the first and last day of the course for seating all facilitators, participants and visitors;
 - b. ____ one smaller room available during the course for each small group of participants, each room having:
 - ____ sufficient table or desk area and chairs for 15–16 participants and at least three facilitators plus the course director plus a separate consultation area with additional chairs
 - ____ additional table area for supplies

- ___ a blackboard or flipchart stand with paper
 - ___ adequate lighting and ventilation
 - ___ freedom from auditory distractions such as road traffic, construction noise or loud music;
- c. ___ one room for an administrative assistant and the course supplies; and
- d. ___ overhead projectors (ideally, one per group, but if this is not possible, equipment may be shared) and, if possible, at least one video-projector.
4. ___ Arrangements made for registering participants for the course.
- a. ___ Sample course registration form (section 4.5 of this guide) reviewed and items added if needed.
 - b. ___ Copies made of the course registration form.
5. ___ Arrangements made for typing and copying materials during the course (for example, registration forms, agendas, list of participants and end-of-course evaluation questionnaires).
6. ___ Arrangements made for meals and coffee or tea service.
7. ___ Arrangements made for reconfirming or changing airline, train, bus and car reservations for participants.
8. ___ Arrangements made for per diem payments to participants and facilitators.
9. ___ Health facilities confirmed to be suitable for visiting. Supervisor and staff at health facility informed about the visit. (See section 2.6 of this guide.)
10. ___ Arrangements made for daily transport, if needed, to and from classrooms.
11. ___ Plans for the opening ceremony of the course finalized with local authorities.
12. ___ Course agenda developed and copies made for each facilitator and participant. (See section 2.5, Suggested matrix and agenda for the course)
13. ___ Course materials and supplies organized and placed in the appropriate classrooms. (See the list in section 2.3 of this guide.)

During the course

1. ____ Course participants registered using course registration form.
2. ____ Participants assigned to groups of 4–5 individuals. Group assignments posted following the opening ceremony.
3. ____ Secretariat monitors or carries out administrative activities.
4. ____ Course directory (including names and addresses of all participants, facilitators and the course director) provided to everyone.
5. ____ Course photograph, if desired, made in time to be printed before closing ceremony.
6. ____ Sample course evaluation form (section 4.6 of this guide) modified as needed and copied for each facilitator and participant.
7. ____ Arrangements made for the closing session.
8. ____ Course completion certificate signed for presentation to each participant.

2.2 Criteria for selecting facilitators

A group of motivated facilitators is needed to conduct this course. The facilitators will guide the plenary sessions and small groups of participants through the units and the field visit. Ideally, three facilitators plus the course director are needed. Even a course with few participants needs at least two facilitators; if necessary, the course director may serve as a facilitator. The facilitators' tasks are described in detail in the guide for facilitators.

Facilitators must be trained before serving as facilitators for the first time. Section 3 of this guide describes how to train facilitators. The criteria below indicate the type of person that should be selected for training as a facilitator.

- Facilitator candidates should be currently competent in planning, organizing, implementing and evaluating activities of TB control programmes and/or HIV/AIDS programmes. They should possess managerial, supervisory and administrative skills in controlling TB and HIV/AIDS. They must have the basic clinical skills and technical knowledge that will allow them to explain the principles for controlling and clinically managing TB and HIV/AIDS.
- They must have good communication skills, including the ability to explain things clearly and simply to other people. Facilitators are expected not only to give lectures but to guide participants through written materials, discussions, etc. Facilitators must be observant individuals who can see when participants are having difficulty, can explain things clearly and can give helpful feedback. Experience in facilitating other modular courses² is helpful but not required.
- They must be familiar with the course materials. Facilitator candidates should, ideally, first attend a course as a participant.³
- Facilitators must be organized. They must be able to keep the group on schedule and plan ahead for the next task.
- Facilitators must be available throughout the course. They must have the energy and motivation to work a long day with participants and then attend a facilitator meeting to review the day's work and prepare for the next day.

Note: In any course, facilitators may identify participants who would eventually make good facilitators themselves. Ask facilitators to point out participants who:

- easily understand the units
- communicate clearly
- help others and work well with others in their group
- participate confidently in discussions.

² Such as:

Management of tuberculosis – training for health facility staff. Geneva, World Health Organization, 2003 (WHO/CDS/TB/2003.313).

IMAI interim guidelines for first-level facility health workers. Geneva, World Health Organization, 2004 (WHO/CDS/IMAI/2004.1 to 4).

³ However, when the course is first introduced in an area, it may be necessary to allow facilitators to become familiar with the course materials by working through them as part of a facilitator training session.

2.3 List of instructional materials needed

Each small group needs the following instructional materials to work on the units in the classroom setting.

Item needed	Number needed
Facilitator guide	One for each facilitator
Participants' manual	One for each facilitator and participant
CD with a complete set of course materials (electronic version)	One for each facilitator and participant
Copy of the agenda	One for each facilitator and participant
List of participants and facilitators	One for each facilitator and participant
For reference as needed, a complete set of the reference material listed in the participants' manual	One set for each small group

2.4 List of other supplies needed

Supplies needed for each person

- Nametag and holder
- Two pens
- Two pencils with erasers
- Paper
- Highlighter
- Folder or large envelope to collect answer sheets
- Calculator (optional but helpful)

Supplies needed for each small group

- Large paper clips (helpful to mark the place in the unit while doing an exercise)
- Pencil sharpener
- Stapler and staples
- One roll of masking tape
- Extra pencils and erasers
- Flipchart pad and markers or a blackboard and chalk
- Overhead projector (if possible), supplies for making overhead transparencies and erasable markers for writing on overhead transparencies

Further, it is optimal to have computers available for participants or to encourage them to bring laptops to the course if they have them. This will facilitate preparing the plan and presenting the conclusions of group work.

2.5 Suggested matrix and agenda for the course

A possible matrix and agenda are given on the next pages. When this agenda is being adapted, keep the following in mind.

- Since groups will work at different paces, the schedule should be flexible. It should not list precise times for completing units but should indicate general time frames instead. You will, however, need to list specific times for beginning and ending the day, breaks and lunch.
- The participants require 5.5 days to complete the units.
- The schedule includes about seven working hours every day. It is assumed that 1–1.5 additional hours will be used for lunch and breaks each day.
- It is helpful to schedule a time apart from regular course hours when at least one facilitator is available to discuss any problems or questions.
- Participants should not be asked to do additional work in the evenings, considering that they are requested to draft their plans for collaborative TB/HIV activities based on what they learned during the training course.

Matrix of the course

Unit	Title	Number of hours	Description
1	Introduction to the course	1.5	Icebreaker session: introduction of facilitators and participants Plenary presentation of the course methods, style and objectives Plenary discussion
2	How to prepare a plan for implementing collaborative TB/HIV activities	1.5	Plenary presentation and discussion on 1) why, when and how to write and update a plan and 2) how to implement collaborative TB/HIV activities within TB and HIV programmes Presentation of the recommended template
3	Epidemiology	1.5	Plenary presentation and discussion of epidemiological data on TB, HIV/AIDS and TB/HIV, with focus on the country-specific data
4	Principles for controlling TB and HIV/AIDS	3.0	Plenary presentation and discussion on the principles of controlling TB and HIV/AIDS
5 part 1	The DOTS strategy for controlling TB	1.5	Plenary presentation and discussion on the WHO-recommended strategy for TB control (DOTS)
5 part 2	Clinical management of TB	1.5	Plenary presentation, group work and discussion on the main issues related to the clinical management of TB (case study)
6 part 1	Universal access to antiretroviral therapy	1.5	Plenary presentation and discussion on universal access to antiretroviral therapy
6 part 2	Clinical management of HIV/AIDS	2.0	Plenary presentation, group work and discussion on the main issues related to the clinical management of HIV/AIDS (case study)
7	Drug management for controlling TB and HIV/AIDS	1.5	Plenary presentation, group work and discussion on drug management for controlling TB and HIV/AIDS
8	The interim policy on collaborative TB/HIV activities	2.0	Plenary presentation, group work and discussion on the principles of the <i>Interim policy on collaborative TB/HIV activities</i>
9	Recording and reporting for implementation of collaborative TB/HIV activities	1.5	Plenary presentation and discussion on relevant country experiences of recording and reporting for TB and HIV/AIDS

10	Surveillance of HIV prevalence among people with TB disease	2.0	Plenary presentation, group work and discussion on the key issues on surveillance (case study)
11	Human resource development for implementing TB/HIV collaborative activities	2.5	Plenary presentation, group work and discussion on human resource development for developing collaborative TB/HIV activities (case study)
12	Monitoring and evaluating the implementation of collaborative TB/HIV activities	3.0	Plenary presentation, group work and discussion on how to monitor and evaluate the implementation of collaborative TB/HIV activities
13	Costing and budgeting for the implementation of collaborative TB/HIV activities	2.5	Plenary presentation, group work and discussion on budgeting for the implementation of TB/HIV collaborating activities in the format of the Global Fund to Fight AIDS, Tuberculosis and Malaria (case study)
14	Case study on delivering services for TB and HIV/AIDS – the example of Malawi	3.0	Plenary presentation and discussion on the experience of a country implementing TB/HIV collaboration (such as Malawi) and/or by the country organizing the course
15	Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS	5.0 ^a	Field visit to TB/HIV services, preceded by a presentation of their structure, followed by plenary discussion on how they are organized and might be improved
16	Individual finalization of plans for implementing collaborative TB/HIV activities	3.0	Tutored individual finalization of plans
17	Discussion of plans for the implementation of collaborative TB/HIV activities	2.0	Plenary presentation and discussion of two plans
18	Course evaluation	2.0	Discussion on the strengths, weaknesses and outcomes of the course

Note: 30 minutes is scheduled daily to allow participants to work on their own plan.

^aThe timing of Unit 15 may depend on local circumstances, the locations and hours of health facilities to be visited, etc

Agenda of the course

An example of an agenda is presented below.

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
Session 1	Registration Unit 1: Introduction to the course	Unit 5, part 1: The DOTS strategy for controlling TB	Unit 8: The interim policy	Unit 12: Monitoring and evaluation	Unit 15: Field visit	Unit 16: continued Unit 17: Discussion of selected plans
Break	Break	Break	Break	Break	Break	Break
Session 2	Unit 2: How to prepare a plan Unit 3: Epidemiology	Unit 5, part 2: Clinical management of TB Unit 6, part 1: Universal access to antiretroviral therapy	Unit 9: Recording and reporting Unit 10: Surveillance of HIV prevalence among people with TB disease	Unit 12: continued Unit 13: Costing and budgeting	Unit 15: continued	Unit 17: continued Unit 18: Course evaluation
Lunch	Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
Session 3	Unit 4: Principles for controlling TB and HIV/AIDS	Unit 6, part 2: Clinical management of HIV/AIDS	Unit 11: Human resource development	Unit 13: continued Unit 14: Case study (Malawi)	Unit 15: continued	
Break	Break	Break	Break	Break	Break	
Session 4	Unit 4: continued	Unit 7: Drug management	Unit 11: continued	Unit 14: continued	Unit 16: Individual finalization of plans	

2.6 Preparing for the field visit

This course includes a field visit in which participants visit a health facility that provides preventive, diagnostic and treatment services for TB and HIV/AIDS. Unit 15 (Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS) describes how to conduct this visit, how to describe the organization of TB and HIV/TB services and to discuss the opportunities to improve coordination between TB and HIV/AIDS services in the health facility visited and in participants' own settings. It provides one item to be completed (to some extent) by participants during the visit:

- Document 15.1: Checklist for the field visit (see participants' manual, Unit 15)

Conduct the field visit at a suitable facility. Read the facilitator guidelines for Unit 15 to learn what participants should do before, during and after the visit.

Criteria for selecting health facility or facilities for the field visit

- Activities related to TB and HIV at the health facility should be as consistent as possible with those taught in the training course.
- The health facility should have a sufficient TB and HIV/AIDS caseload.
- The director and staff of the facility should be interested in the course and willing and able to cooperate. Ideally, they should be able to identify one or two people being treated who are willing to be interviewed by participants.
- It is best if the health facility is close to the classrooms to minimize travel time.

You will need to visit the health facility in advance to view the facility and determine how many participants can comfortably attend the visit at a time. If there are more than 15 participants, more than one group should be organized (such as two groups of 7–8 participants each) to ensure time and opportunities to pose questions and, ideally, to find people being treated for all participants to interview.

During the preparatory visit, discuss with the staff of the health facility about the participants who will be visiting and ask for their cooperation. Explain that participants would like to learn by observing and asking questions. Explain that they will have checklists to guide their observations and questions. Ideally, participants will need access to the health worker responsible for treating people with TB and HIV, but they should not interfere with care. Mention that participants would like to see the recording and reporting forms for TB and HIV/AIDS. Also mention that participants are mainly interested in how the health facility organizes collaborative TB/HIV activities.

<u>Units</u>	<u>Information sources needed to complete sections of the checklist</u>
8	Coordinating body for TB/HIV activities Joint TB/HIV planning
8, 10	Surveillance of HIV prevalence among people with TB disease
8, 12	Monitoring and evaluation

- 4, 6, 8 Intensified TB case-finding among people living with HIV/AIDS
Isoniazid preventive therapy among people living with HIV/AIDS
Controlling TB in health care and congregate settings
HIV testing and counseling
Methods of preventing HIV
Co-trimoxazole preventive therapy
HIV/AIDS care and support
- 5, part 2 TB laboratory services
- 6, part 2 HIV/AIDS laboratory services
- 7 Anti-TB drugs
Antiretroviral drugs and other HIV/AIDS drugs
- 9 TB forms for recording and reporting
HIV/AIDS forms for recording and reporting

Request that participants be allowed to observe how the health facility organizes collaborative TB/HIV activities.

Ask about the best times to schedule visits so that people with TB and HIV/AIDS are likely to be present. It will be useful for participants to interview at least one of them.

Try to schedule the field visit towards the end of the course and allow time for discussion following the visit. The visit will be most effective if the participants have already learned about the topics presented during the course (units 1–14 of the Manual for participants).

Schedule each group planned to visit the health facility at an appropriate time. If the facility is very small and the group is large (eight or more participants), divide into two groups to visit on different days or select an additional facility to visit. Make arrangements for transporting each small group.

The schedule should allow about two hours at the health facility. In addition, allow time for transport to and from the health facility.

3. Guidelines for conducting the facilitator training (three days)

3.1 Overview of the training

Who should attend the facilitator training?

All facilitator candidates should attend the full facilitator training unless they are experienced facilitators or have already been trained. It is highly recommended that all new facilitators attend the entire facilitator training (three days).

Who conducts facilitator training?

Course directors are responsible for conducting facilitator training. If possible, a co-director or an experienced facilitator should assist the course director. Since training is intensive, two people should work together. By working together, two course directors can demonstrate how co-facilitators share the work during the actual course.

What is accomplished during facilitator training?

During the facilitator training, the facilitator trainees will work quickly through the modules and will take turns practising the teaching activities described in the Guide for facilitators. In addition to reviewing the content of the units, there will be extensive discussion and practice of facilitator techniques including:

- working with a co-facilitator
- introducing a unit
- giving a presentation.

By the end of facilitator training, trainees will be well prepared to work with a co-facilitator to lead participants through the course.

When and where should facilitator training occur?

The facilitator training requires three days. (Section 3.2 provides a suggested schedule.) The training should occur before the course. There should be at least one full day off between facilitator training and the course to allow facilitators to rest.

It is helpful to train facilitators in the same venue that will be used in the actual course. In that way, the group can become accustomed to the facility and the surroundings in which they will be working.

How do facilitator trainees learn to teach the course?

Two methods are used to demonstrate and practise facilitator techniques.

- **The course director acts as a facilitator.** Facilitator trainees observe appropriate facilitator behaviour as the course director manages a unit (introduces a module, leads a plenary discussion, etc.).
- **A facilitator trainee acts as a facilitator, facilitating a unit.** After the course director has demonstrated how to manage a unit, facilitator trainees practise the

various techniques by managing the assigned units (for example, introducing a unit or leading a plenary discussion). While practising, the trainees also demonstrate these teaching activities for the others. After every activity, it is important to discuss the trainees' performance and give feedback.

By the end of facilitator training, every trainee should have practised each facilitator technique. A practice assignment grid is provided on the last page of section 3.3 to help the course director ensure that each trainee has adequate practice. Make a copy of this grid and list the names of the trainees. Whenever someone practises a technique, make an entry on this grid.

During the training course, as one facilitator will be responsible for managing a given unit (introducing the unit or leading the plenary discussion), the other facilitators can collaborate based on their own specific competence and expertise (such as by commenting, adding issues, stimulating the discussion, etc.). The course director will act as a facilitator.

3.2 Preparing a schedule for facilitator training

The detailed agenda of the facilitator training will depend on the number of facilitators and their specific areas of expertise and experience. This section contains a sample agenda based on the assumption that three facilitators will be trained. Any modification of the agenda should keep the following in mind.

- The first half day should cover the overall structure, procedure and expected outcome of the training course for programme managers: demonstrating how the units should be managed and assigning units to facilitators.
- The afternoon of the first day should be totally devoted to facilitator trainees preparing the units they have been assigned.
- The full second day should be devoted to practice by the facilitator trainees. Each trainee should practise the full management of at least one and preferably two of the units for which they are responsible.
- Any remaining time the second day and most of the third day should be devoted to discussing each of the remaining units, unit by unit, to ensure that facilitator trainees understand all units in the course.

A sample schedule for the facilitator training is found at the end of this section. The course director should keep the following criteria in mind when assigning units to facilitators.

- Consider the specific areas of expertise and experience of each facilitator.
- Units 1 and 18 are related to the official opening and closing of the course. Further, many administrative and logistical announcements will be given within these units. The course director is recommended to manage them.
- Unit 2 is recommended to be managed by the course director, as an example of how a unit is managed.

- Distribute equally the units that include one exercise, such as two per facilitator (units 5, part 2; 6, part 2; 7; 8; and 10–13). Facilitators need to become familiar with the technique of introducing units and leading discussions when an exercise is included. Adequate time should be allocated to discuss any difficulties or problems related to these activities.
- Distribute equally among facilitators the units that include conceptual and technical difficulty in the presentation(s), taking into account the allocation above (such as units 3; 4; 6, part 2; 7; 9; 10; and 12). Adequate time should be allocated to discuss any difficulties or problems related to these activities.
- Units 3, 5 and 6 have some similarities. All three units imply comprehensive discussion in which facilitators recall concepts presented and discussed in previous units. All three units need to be discussed extensively during the facilitator training. It is recommended to assign each of these units to a different facilitator. For example, Unit 3 can be assigned to both facilitators with a background in TB (3.1) and facilitators with a background in HIV/AIDS (3.2–3.3); Unit 5 to facilitators with a background in TB and Unit 6 to facilitators with a background in HIV/AIDS.
- Unit 8 is pivotal to the overall comprehension of the course content. If none of the facilitators has attended the course previously, the course director is recommended to manage the unit.
- Unit 13 requires specific competence in costing and budgeting. It can be assigned to a facilitator with a specific competence in this field or managed by the course director.

Day 2 and half day 3 are used to review the various units. A sample of units with exercises (such as Unit 6, part 2; 7; 8; 11; and 12) will be performed completely, allowing facilitators to manage at least one unit. Similarly, a sample of units with conceptual and technical difficulties should be performed completely (such as Unit 3, presentation 3.3 only; 4; 6, part 2; 7; and 12). Note that Unit 6, part 2 and Unit 7 have been already mentioned previously, as they also have an exercise.

All the remaining units should be discussed briefly, to identify key issues to discuss and solve any problems.

The last part of that will be devoted to reviewing facilitator techniques and the key content of the various units and to solve any problems that may arise, starting from the units with extensive discussion (Units 13–15 and 17). The concluding unit should be reviewed (Unit 18) and the concluding session devoted to the practical arrangements (such as arranging the classrooms for the course).

This schedule can be used to make a more precise schedule, including specific dates and times, once you know the times and arrangements for lunch, breaks, etc. When you are adapting this schedule, keep the following points in mind.

- The schedule is for three working days. Seven working hours have been scheduled each day. It is assumed that an additional 1–1.5 hours will be needed for lunch and breaks.

- Facilitator training is critical to the success of the training. The three-day schedule is tight. Facilitator trainees will review in only three days what they will teach to course participants in 5.5 days. Do not try to shorten the schedule.
- The schedule will require facilitators to work in a concentrated manner. Units will be reviewed very quickly, and homework will be required each night (in contrast to a course where participants are not given homework), as they have to draft their plans for implementing collaborative TB/HIV activities.
- Classroom time will focus on discussing and practising facilitator techniques, such as introducing units, leading plenary discussions, etc.
- The schedule should be flexible. If work is completed ahead of schedule on a certain day, facilitator trainees should begin work on the next unit. If work takes too long, extra homework can be assigned or some activities delayed until the next day.
- Reserve time on the last day for arrangements such as discussing the schedule for the course, assigning classrooms and distributing instructional materials and supplies.

There should be at least one complete day off before the course to allow facilitators to rest.

Note: From time to time, remind facilitator trainees that the course will not be conducted the way that facilitator training is conducted. During the course, facilitators and participants will read a unit in the participants' manual, introduce a unit, give a presentation, lead a plenary discussion and answer questions, etc., in the order described in the facilitator guide. Homework is not recommended during the course. Refer to the facilitator guide and the actual course agenda frequently, so everyone understands how the actual course will differ from facilitator training.

Suggested schedule for facilitator training

Facilitator training, day 1	
Sessions	Time (hours)
1. Opening session A. Introductions B. Administrative tasks C. Review of the purpose of the course for managers	0.5
2. Introduction to facilitator training A. Context of facilitator training B. Objectives of facilitator training C. Materials needed D. Teaching methods E. Schedule for facilitator training F. Introduction of the facilitator guide	1.0
3. How to manage a unit Unit 1: Introduction to the course A. Review and demonstration B. Facilitator technique: working in a team with other facilitators Unit 2: How to prepare a plan for implementing collaborative TB/HIV activities A. Facilitator technique: introducing a unit B. Give a presentation C. Lead the plenary discussion and answer questions D. Summarize the unit	2.0
4. Discussion	1.0
5. Allocation of units to facilitators	0.5
6. Self-review of the assigned units Each facilitator trainee: ▪ works through his or her assigned units ▪ reads the corresponding facilitator guidelines ▪ prepares for managing assigned units	4.0

Facilitator training, day 2	
Sessions	Time (hours)
7. Unit 3: Epidemiology A. Facilitator trainee manages the unit B. Provide feedback to the facilitator trainee C. Points to remember for managing the unit	1.0
8. Unit 4: Principles for controlling TB and HIV/AIDS A. Facilitator trainee manages the unit B. Provide feedback to the facilitator trainee C. Points to remember for managing the unit	2.0
9. Unit 6, part 2: Clinical management of HIV/AIDS A. Facilitator trainee manages the unit B. Provide feedback to the facilitator trainee C. Points to remember for managing the unit	1.5
10. Unit 7: Drug management for controlling TB and HIV/AIDS A. Facilitator trainee manages the unit B. Provide feedback to the facilitator trainee C. Points to remember for managing the unit	1.5

11. Unit 9: Recording and reporting for the implementation of collaborative TB/HIV activities A. Facilitator trainee manages the unit B. Provide feedback to the facilitator trainee C. Points to remember for managing the unit	1.0
12. Unit 10: Surveillance of HIV prevalence among people with TB disease A. Facilitator trainee manages the unit B. Provide feedback to the facilitator trainee C. Points to remember for managing the unit	1.5

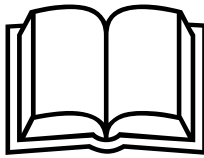
Facilitator training, day 3	
Sessions	Time (hours)
13. Unit 5, part 1: The DOTS strategy for controlling TB Review of the management of the unit	0.5
14. Unit 5, part 2: Clinical management of TB Review of the management of the unit	0.5
15. Unit 6, part 1: Universal access to antiretroviral therapy Review of the management of the	0.5
16. Unit 8: The interim policy on collaborative TB/HIV activities Review of the management of the unit	1.0
17. Unit 11: Human resource development for implementing collaborative TB/HIV activities Review of the management of the unit	1.0
18. Unit 12: Monitoring and evaluating the implementation of collaborative TB/HIV activities Review of the management of the unit	0.5
19. Unit 13: Costing and budgeting for the implementation of TB/HIV collaborative activities Review of the management of the unit	0.5
20. Unit 14: Case study on delivering services for TB and HIV/AIDS – the example of Malawi Review of the management of the unit	0.5
21. Unit 15: Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS Review of the management of the unit	0.5
22. Unit 16: Individual finalization of plans for implementing TB/HIV collaborative activities Review of the management of the unit	0.5
23. Unit 17: Discussion of plans for implementing collaborative TB/HIV activities Review of the management of the unit	0.5
24. Unit 18: Course evaluation Review of the management of the unit	0.5
25. Concluding session: A. Discussion of any remaining problems B. Practical arrangements for the course C. Closing remarks to facilitators D. Facilitators discuss the plans for the first day and arrange the classroom	1.5

3.3 Using this guide to conduct the facilitator training

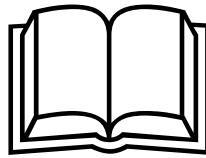
As a course director, you should be familiar with this course and have experience as a facilitator in this course or similar courses. To prepare to teach others to be facilitators, read this guide and reread and study the facilitator guide.

When you are conducting the facilitator training, keep available the schedule on the previous pages for an overview of the steps to be accomplished each day.

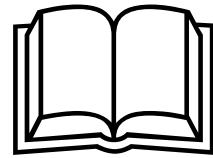
This section gives instructions, day by day and step by step, for conducting facilitator training. Just turn to the appropriate day and follow the instructions. Some instructions tell you to go to the facilitator guide and perform certain steps described there. When you do that, leave the guide for the course director open to keep your place. When you have finished the steps in the facilitator guide, look back at the course director's guide to find out what to do next. You will have two guides and a unit in the participants' manual open at the same time, as shown below:



Course director's guide



Facilitator guide



Unit

Instructions for the first day of facilitator training begin on the next page.

Facilitator training, day 1

Session 1

Opening session

Examples of slides or overhead transparencies for this opening session are provided throughout this section (section 3.4 has full-page images for photocopying onto transparency film). The slides may be used in a PowerPoint presentation, for which a CD is provided with this course, or they may be made into transparencies for use with an overhead projector. The paragraphs below explain how to proceed with the training and the individual slides in detail.

A. *Introductions*

Introduce yourself as the course director, providing general information about yourself and your experience in TB/HIV training. Ask the facilitator trainees to introduce themselves and to share other information about themselves.

B. *Administrative tasks*

Make any necessary announcements regarding meals, transport, payments, hotel arrangements, etc.

C. *Review the purpose of the course (slide 1, guide for the course director)*

Slides 3–5 of document 1.1 in the participants' manual also summarize the purpose of the course (the goal in slide 3 and the objectives in slides 4–5).

The overall goal of the training course is to further develop the skills needed to plan and implement collaborative TB/HIV activities based on the WHO-recommended strategies for controlling TB and HIV/AIDS.

The objectives of the course are reported as presented in the participants' manual. The first objective of the course is to analyse data on the key components of national TB control programmes and national HIV/AIDS programmes. The second objective of the course is to identify gaps and priorities in TB/HIV collaboration and propose solutions to facilitate the implementation of collaborative TB/HIV activities. The third and last course objective is to prepare a plan for implementing collaborative TB/HIV activities.

As this course is designed for TB and HIV managers operating at a national or subnational level responsible for planning, organizing, implementing and evaluating activities of TB control programmes and/or HIV/AIDS programmes, it does not teach the clinical skills and knowledge needed to detect and treat cases of TB or HIV/AIDS at the health facility level. Other courses teach these skills and knowledge.

Participants are expected to return to their jobs and make changes to implement collaborative TB/HIV activities in their own settings.

Session 2

Introduction to facilitator training

A. *Context of facilitator training (slide 2, guide for the course director)*

Cover the following points:

- [Number] participants will be attending the course entitled Management of collaborative TB/HIV activities: training for managers at the national and subnational level on [dates].
- The participants will be TB and HIV managers operating at a national or subnational level responsible for planning, organizing, implementing and evaluating activities of TB control programmes and/or HIV/AIDS programmes.
- All of you will be facilitators to assist participants in learning the skills presented in the course materials. These three days are your time to work through the materials and prepare to teach others.
- As facilitators, you will work as a team to facilitate the course. The course is divided into 18 units. Each facilitator will be assigned about [number] units. During facilitator training, each of you will work with several other trainees to learn how to manage all 18 units.

B. *Materials needed (slide 3, guide for the course director)*

Give each facilitator the following materials:

- manual for participants (set of 18 units with slides);
- guide for facilitators ; and
- a CD with all course materials.

The participants' manual includes the introduction to the exercises and the printed-out slides. The facilitator guide includes additional information on how to manage the units.

C. *Objectives of facilitator training (slide 4, guide for the course director)*

The objectives of facilitator training are:

- to learn the course content;
- to practise the teaching techniques used with the units (for example, introducing a unit; giving a presentation; leading plenary discussions and answering questions; and summarizing units);
- to learn ways to work effectively in a team with other facilitators;
- to practise communicating in supportive ways that reinforce learning; and
- to talk about problems that may arise during the course (for example, slower participants, logistical difficulties or sections of a unit that may be difficult to teach) and prepare to handle these problems.

Facilitator training is far more than learning the content of the course materials; it is also learning teaching techniques.

D. *Teaching methods (slide 5, guide for the course director)*

Explain that the teaching methods of this course are based on several assumptions about learning.

Instruction should be performance-based.

Instruction should teach the tasks that the participant will be expected to do on the job. This course is based on an analysis of competencies needed to implement collaborative TB/HIV activities. Each module teaches the knowledge and skills needed to plan and implement some of these activities. Each unit lists the learning objectives at the beginning.

Active participation improves learning.

Participants learn far more quickly and efficiently by actually doing a task than by just reading or hearing about it. Practice helps participants remember more and keeps them interested and alert. This course actively involves the participants in written exercises and plenary discussions as well as in the field visit.

Learning improves 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 comfortable pace. Each participant should ask questions and receive explanations to the extent necessary to understand and acquire the skill and knowledge. This course is structured to enable the participants to do the exercises at a comfortable pace and then to discuss any problems or questions with facilitators individually or in plenary sessions.

Positive motivation is essential if learning is to take place.

Participants have to want to learn for instruction to be effective. Most participants come to a course highly motivated. Facilitators help the participants to maintain this motivation by providing individual attention, giving prompt feedback when required, reinforcing them for their work on the exercises, ensuring that they understand each exercise and encouraging them in group activities.

E. *Schedule for facilitator training (slide 6, guide for the course director)*

Distribute a written schedule for facilitator training based on the one given in section 3.2 of this guide. Explain that this three-day schedule is very much condensed from the full 5.5-day course. Give facilitator trainees a copy of the actual course schedule as well, so that they can compare the activities and pace of the actual course with those of facilitator training.

Explain that facilitator trainees will move very quickly through the units and will focus mainly on teaching techniques.

F. *Introduction of the facilitator guide (slides 7 and 8, guide for the course director)*

Trainees will learn to use the facilitator guide during the three-day training.

Ask trainees to read the introduction to the guide for facilitators, focusing on the description of the roles and responsibilities of a facilitator.

Answer any questions. Then briefly summarize the major duties of a facilitator (slide 7, guide for the course director):

- to introduce the units;
- to give a presentation;
- to assist participants while they work in groups;
- to lead plenary discussions and answer questions;
- to demonstrate or explain certain steps;
- to supervise the field visit; and
- to assist participants while they draft the plans for implementing collaborative TB/HIV activities.

Urge facilitator trainees to follow the procedures in the facilitator guide and make the points specified. Review the parts of the facilitator guide (slide 8, guide for the course director):

- checklists of instructional materials and supplies needed (introduction to the guide for facilitators);
- the section on guidelines for all modules following the introduction to the guide for facilitators;
- the list of procedures for each unit; and
- notes for each step of the procedures.

You may want to write “Remember to use your facilitator guide” on a flipchart page and leave the message visible throughout the training. Encourage trainees to write notes in their guides about important points to make during the course.

Session 3

How to manage a unit

The course director will manage Units 1 and 2 as an example of how to manage the different units of the course.

Unit 1: Introduction to the course

A. *Review and demonstration*

Ask trainees to open the facilitator guidelines for Unit 1 of the facilitator guide. Point out the list of procedures and the corresponding notes. Ask the group to follow along as you use the notes to lead them through Unit 1.

Follow the procedures closely, but save time by asking trainees to review the contents of the unit quickly rather than reading carefully. Since trainees have

already introduced themselves, simply mention the step of introductions rather than doing it.

If you have an assistant, turn to your assistant for help in remembering to include all of the relevant points. For example, ask aloud, “Have I forgotten anything?”. In this way, you will demonstrate one way of working in a team with other facilitators.

When you have finished, tell the group that you have just demonstrated most of the procedures for Unit 1. Answer any questions about how to use the facilitator guide.

B. Facilitator technique: working in a team with other facilitators

Explain that facilitators can help each other and work together as a team in several ways. For example, while one facilitator is leading a discussion, introducing the unit, or giving a presentation, other facilitators can:

- record information on the flipchart;
- follow along in the facilitator guide to ensure that no important points are omitted; and
- politely add certain points if necessary.

During facilitators’ training, encourage trainees to talk about previous teaching experiences and individual strengths and weaknesses. They should agree on their roles and responsibilities and on how to work together as a team.

The following are suggestions for working together as a team of facilitators.

- Discuss in advance how to work together on exercises and other activities. Review the teaching activities for the next day during the facilitator’s meeting and agree who will help the facilitator in charge of each unit. Do not divide your work with the attitude that “this is your part and this is mine”. Be flexible and ready to adjust roles if needed.
- Work together on each unit rather than taking turns at having sole responsibility for a unit. During each unit, you will at some times be the leader and at other times the helper, writing on the flipchart, etc.
- When leading a discussion, always try to ask the opinion of other facilitators. For example, ask, “Dr King, do you have something to add?” or “Would you agree with this explanation?”.
- When you are assisting, be respectful and polite. Give the facilitator in charge of the given unit your full attention. If you need to add information, wait until a suitable point in the presentation. Then politely ask, “Do you mind if I add something here?”. Or say, “Excuse me, there is one more point I would like to mention”.
- Avoid directly contradicting other facilitators in front of the group. If you think that the facilitator in charge of a unit is making a mistake or is giving incorrect information, say, “Excuse me, may I clarify that?”. If the situation

is more complicated, quickly excuse yourselves, discuss the error privately and decide how to clarify the explanation to the group. The group must be given correct information as soon as possible. A serious disagreement between facilitators may require help from the course director.

Unit 2: How to prepare a plan for implementing collaborative TB/HIV activities

Facilitator trainees will now begin Unit 2: How to prepare a plan for implementing collaborative TB/HIV activities. During facilitator training, facilitators must work quickly. In contrast, in the actual course, facilitators should not rush participants through the materials but should allow them to proceed at a comfortable pace. Homework is not recommended during the course, as participants will be tired at night and they have to draft their plans.

A. Facilitator technique: introducing a unit

Demonstrate introducing Unit 2 as described in the guidelines for Unit 2 of the facilitator guide. Ask facilitator trainees to notice the instructions for introducing the unit while you speak. Explain that, from now on, you will ask one of them to introduce each unit. Tell them to keep their introductions brief (just a few remarks of 1–3 minutes). They should not lecture on the content of the unit at this stage but should cover the points in the facilitator guide.

B. Give a presentation

Demonstrate giving the presentation of Unit 2 as described in the facilitator guide. Explain that, from now on, you will ask one of them to give presentations in each unit. Tell them to keep their presentations brief (just one minute per slide). Say that the slides for this unit are presented in Document 2.1 in the participants' manual and that the guidelines for Unit 2 of the facilitator guide explain the individual slides. Explain also that the template for the plan is available both as a file and on paper in the participants' manual (Document 2.2, plan template).

C. Lead the plenary discussion and answer questions

Demonstrate how to lead the group discussion in Unit 2, being careful to use good facilitator techniques and to follow the steps in the facilitator guide. Discuss with participants how the plan template (Document 2.2) should be filled out. If necessary, ask trainees to complete one activity on the template (such as setting up a coordinating body for collaborative TB/HIV activities at all levels). To stimulate the discussion, refer to Unit 8 in the participants' manual and facilitator guide and look at slide 13, summarizing the 12 collaborative activities of the interim policy document.

D. Summarize the unit

Ask trainees to quickly review the content of Unit 2 in the participants' manual (including the slides in Document 2.1) and in the guidelines for this unit in the guide for facilitators.

Ask one trainee to summarize the unit. Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remind trainees that, at this stage, they should encourage course participants to read the background document on Fictitia (Annex 1 of the participants' manual) to be familiar with its content in order to be able to perform the exercises based on the case study proposed in the following units. For this reason, ask trainees to read the document themselves.

Session 4

Discussion

Discuss with trainees any possible problem arising on how to manage a unit. Announce that the entire afternoon will be devoted to reviewing individually the units assigned to each facilitator trainee.

Session 5

Allocation of units to facilitators

Assign units to facilitators. In assigning the different units, keep in mind the criteria already presented in section 3.2.

- Consider the specific areas of expertise and experience of each facilitator.
- As already discussed, the course director should manage Units 1, 2, 12 and 18.
- Distribute equally the units that include one exercise (Units 5, part 2; 6, part 2; 7; 8; and 10–13), the units including conceptual and technical difficulty in the presentation(s) (Units 3; 4; 6, part 2; 7; 9; 10; and 12) and those implying comprehensive discussion (Units 14, 15 and 17).
- Assign Unit 13 to trainee facilitators with specific competence in costing and budgeting or manage it yourself.

Remember to keep track of assignments on the practice assignment grid shown at the end of this section (3.3).

Session 6

Self-review of the assigned units

Explain that each facilitator trainee should devote the entire afternoon to:

- working through his or her assigned units;
- reading the corresponding facilitator guidelines; and
- preparing for managing assigned units.

Facilitator training, day 2

Session 7

Unit 3: Epidemiology

One or more facilitators will be in charge of Unit 3, as it consists of three presentations on the epidemiology of TB, HIV/AIDS and TB/HIV. Although all presentations need to be prepared, only one will be presented and discussed completely during facilitator training. The unit will be selected in agreement with the course director. Unit 3 is presented in detail as an example of a unit including conceptual and technical difficulty in the presentations.

A. *A facilitator trainee manages the unit*

A facilitator trainee manages the unit in accordance with the instructions in the facilitator guide. The role of the other trainees and of the course director is to observe and take notes to provide feedback.

B. *Provide feedback to the facilitator trainees*

The course director and other facilitator trainees provide feedback to the facilitator trainee in charge of the unit and solve any problems.

C. *Points to remember for managing the unit*

Review with facilitator trainees the fact that the guidelines for Unit 3 of the facilitator guide provide instructions for giving the presentations to ensure that there are no outstanding questions.

Remind facilitator trainees about time management. Three presentations are long to present: time must be managed effectively. Tell them to keep their presentations brief (just one minute per slide).

Discuss how to lead the plenary discussion in Unit 3 and review the corresponding instructions in the guide for facilitators.

Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remember to keep track of assignments on the practice assignment grid shown at the end of this section.

Remind trainees that, at this stage, they should continue to encourage course participants to read the background document on Fictitia (Annex 1 of the participants' manual), to be familiar with its content in order to be able to perform the exercises based on the case study proposed in the following units.

Proceed directly to Unit 4: Principles for controlling TB and HIV/AIDS.

Session 8

Unit 4: Principles for controlling TB and HIV/AIDS

The facilitator trainee in charge will now begin Unit 4: Principles for controlling TB and HIV/AIDS. Unit 4 is presented in detail as an example of a unit including conceptual and technical difficulty in the presentations.

A. A facilitator trainee manages the unit

A facilitator trainee manages the unit in accordance with the instructions in the facilitator guide. The role of the other trainees and of the course director is to observe and take notes to provide feedback.

B. Provide feedback to the facilitator trainees

The course director and other facilitator trainees provide feedback to the facilitator trainee in charge of the unit and solve problems.

C. Points to remember for managing the unit

Review with facilitator trainees the fact that the guidelines for Unit 4 of the facilitator guide provide instructions for giving the presentations to ensure that there are no outstanding questions.

Remind facilitator trainees about time management. These two presentations are long to present: time must be managed effectively. Tell them to keep their presentations brief (just one minute per slide).

Discuss how to lead the plenary discussion in Unit 4 and review the instructions in the facilitator guide for Unit 4.

Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remember to keep track of assignments on the practice assignment grid.

Remind trainees that, at this stage, they should continue to encourage course participants to read the background document on Fictitia (Annex 1 of the participants' manual), to be familiar with its content in order to be able to perform the exercises based on the case study proposed in the following units.

Proceed directly to Unit 6, part 2: Clinical management of HIV/AIDS.

Session 9

Unit 6, part 2: Clinical management of HIV/AIDS

The facilitator trainee in charge will now begin Unit 6, part 2: Clinical management of HIV/AIDS. Unit 6, part 2 is presented in detail as an example of a subunit including conceptual and technical difficulty in the presentations as well as an exercise.

A. *A facilitator trainee manages the unit*

A facilitator trainee manages the unit in accordance with the instructions in the facilitator guide.

Remind the facilitator trainee that this session will only cover the first part of the exercise: “Analyse what the national HIV/AIDS programme has done so far in the country in relation to WHO recommendations for a public health approach, with special focus on: 1) eligibility for antiretroviral therapy; ...”

B. *Provide feedback to the facilitator trainees*

The course director and other facilitator trainees provide feedback to the facilitator trainee in charge of the unit and solve any problems.

C. *Points to remember for managing the unit*

Review with facilitator trainees the fact that the guidelines for Unit 6, part 2 of the facilitator guide provide instructions for giving the presentations to ensure that there are no outstanding questions.

Remind facilitator trainees about time management. Remind them to keep their presentations brief (just one minute per slide) to save the time necessary for fruitful discussion and the exercise. The presentation in this unit is long and rather complicated.

Discuss how to lead the plenary discussion in Unit 6, part 2 and review the instructions in the facilitator guide.

Encourage trainees to watch participants as they begin an exercise to ensure that they understand what to do. Participants who take a long time to understand the instructions for an exercise or who misunderstand the instructions can use a lot of time. Further, they may become frustrated and may affect the work of the entire group. If you observe such difficulty, offer help immediately.

Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 7: Drug management for controlling TB and HIV/AIDS

Session 10

Unit 7: Drug management for controlling TB and HIV/AIDS

The facilitator trainee in charge will now begin Unit 7: Drug management for controlling TB and HIV/AIDS. Unit 7 is presented in detail as an example of a unit that includes conceptual and technical difficulty in the presentations as well as an exercise.

A. *A facilitator trainee manages the unit*

A facilitator trainee manages the unit in accordance with the instructions in the facilitator guide.

Remind the facilitator trainee that this session will only cover the first part of the exercise: “Select one specific country (or a region within the country) representing the group members. Provide figures (or estimates) on: 1) the number of people infected with HIV, coinfected with TB and HIV and HIV-positive people with TB disease living in the country (or region); and 2) the number of people eligible for antiretroviral therapy in the country (or region) and the number of people requiring TB treatment and isoniazid preventive therapy.”

B. *Provide feedback to the facilitator trainees*

The course director and other facilitator trainees provide feedback to the facilitator trainee in charge of the unit and solve any problems.

C. *Points to remember for managing the unit*

Review with facilitator trainees the fact that the guidelines for Unit 7 of the facilitator guide provide instructions for giving the presentations to ensure that there are no outstanding questions.

Remind facilitator trainees about time management. Remind them to keep their presentations brief (just one minute per slide) to save the time necessary for fruitful discussion and the exercise.

Discuss how to lead the plenary discussion in Unit 7 and review the instructions in the facilitator guide.

Encourage trainees to watch participants as they begin an exercise to ensure that they understand what to do. Participants who take a long time to understand the instructions for an exercise or who misunderstand the instructions can use a lot of time. Further, they may become frustrated and may affect the work of the entire group. If you observe such difficulty, offer help immediately.

Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 9: Recording and reporting for the implementation of collaborative TB/HIV activities.

Session 11

Unit 9: Recording and reporting for the implementation of collaborative TB/HIV activities

The facilitator trainee in charge will now begin Unit 9: Recording and reporting for the implementation of collaborative TB/HIV activities.

A. *A facilitator trainee manages the unit*

A facilitator trainee manages the unit in accordance with the instructions in the facilitator guide.

B. *Provide feedback to the facilitator trainees*

The course director and other facilitator trainees provide feedback to the facilitator trainee in charge of the unit and solve any problems.

C. *Points to remember for managing the unit*

Review with facilitator trainees the fact that the guidelines for Unit 9 of the facilitator guide provide instructions for giving the presentations to ensure that there are no outstanding questions.

Remind facilitator trainees about time management. Remind them to keep their presentations brief (just one minute per slide) to save the time necessary for fruitful discussion.

Discuss how to lead the plenary discussion in Unit 9 and review the instructions in the facilitator guide, Unit 9.

Give trainees the forms for recording and reporting used in the country or area where the course is conducted. They become Document 9.3 of the participants' manual: TB and HIV/AIDS forms. Be sure that any problems related to these forms are solved before summarizing the unit.

Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 10: Surveillance of HIV prevalence among people with TB disease.

Session 12

Unit 10: Surveillance of HIV prevalence among people with TB disease

The facilitator trainee in charge will now begin Unit 10: Surveillance of HIV prevalence among people with TB disease.

A. *A facilitator trainee manages the unit*

A facilitator trainee manages the unit in accordance with the instructions in the facilitator guide.

Remind the facilitator trainee that this session will only cover the part of the exercise on estimating the sample size and costs for a special survey to be conducted in Fictitia to estimate the prevalence of HIV among people with TB disease.

B. *Provide feedback to the facilitator trainees*

The course director and other facilitator trainees provide feedback to the facilitator trainee in charge of the unit and solve any problems.

C. *Points to remember for managing the unit*

Review with facilitator trainees the fact that the guidelines for Unit 10 of the facilitator guide provide instructions for giving the presentations to ensure that there are no outstanding questions.

Remind facilitator trainees about time management. Remind them to keep their presentations brief (just one minute per slide) to save the time necessary for fruitful discussion and the exercise.

Discuss how to lead the plenary discussion in Unit 10 and review the instructions in the guide for facilitators.

Encourage trainees to watch participants as they begin an exercise to ensure that they understand what to do. Participants who take a long time to understand the instructions for an exercise or who misunderstand the instructions can use a lot of time. Further, they may become frustrated and may affect the work of the entire group. If you observe such difficulty, offer help immediately.

Discuss with trainees the content and the technique used to summarize the unit. If necessary, ask another trainee to summarize the unit again.

Remember to keep track of assignments on the practice assignment grid.

Explain to participants that the third day of facilitator training will be devoted to discussing each of the remaining units, unit by unit, to ensure that facilitator trainees clearly understand all units in the course. The units will be discussed without managing them completely. As a closing remark for the day, ask trainees to review briefly during the evening the remaining units to be ready for fruitful discussion during the following day.

Facilitator training, day 3

Session 13

Unit 5, part 1: The DOTS strategy for controlling TB

Review of the management of the unit

Refer to the guidelines in Unit 5, part 1 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 5, part 1 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the subunit.
- Ask the assigned trainee and the others to comment on the presentation (Document 5.1, The DOTS strategy), and discuss any possible problems arising from it.
- Ask the assigned trainee and the others to comment on the discussion component of the subunit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the subunit.

Answer any questions about the content of Unit 5, part 1 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 5, part 2: Clinical management of TB

Session 14

Unit 5, part 2: Clinical management of TB

Review of the management of the unit

Refer to the guidelines in Unit 5, part 2 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 5, part 2 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the subunit.
- Ask the assigned trainee and the others to comment on the presentation (Document 5.2, Clinical management of TB) and on the exercise (Document 5.3, Introduction to the exercise for Unit 5), and discuss any possible problems arising from it.
- Ask the assigned trainee and the others to comment on the discussion component of the subunit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the subunit.

Answer any questions about the content of Unit 5, part 2 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 6, part 1: Universal access to antiretroviral therapy

Session 15

Unit 6, part 1: Universal access to antiretroviral therapy

Review of the management of the unit

Refer to the guidelines in Unit 6, part 1 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 6, part 1 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the subunit.
- Ask the assigned trainee and the others to comment on the presentation (Document 6.1, Universal access to antiretroviral therapy) and discuss any possible problems arising from it.
- Ask the assigned trainee and the others to comment on the discussion component of the subunit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the subunit.

Answer any questions about the content of Unit 6, part 1 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 8: The interim policy on collaborative TB/HIV activities

Session 16

Unit 8: The interim policy on collaborative TB/HIV activities

Review of the management of the unit

Refer to Unit 8 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 8 of the facilitator guide, ask the assigned trainee (you will be probably in charge of it) and the others whether there are any problems or questions related to introducing the unit.
- Ask the assigned trainee and the others to comment on the presentation (Document 8.1, Review of the Interim policy on collaborative TB/HIV activities) and on the exercise (Document 8.2, Introduction to the exercise for Unit 8) and discuss any possible problems arising from them.
- Ask the assigned trainee and the others to comment on the discussion component of the unit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the unit.

Answer any questions about the content of Unit 8 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 11: Human resource development for implementing collaborative TB/HIV activities

Session 17

Unit 11: Human resource development for implementing collaborative TB/HIV activities

Review of the management of the unit

Refer to the guidelines in Unit 11 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 11 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Ask the assigned trainee and the others to comment on the presentation (Document 11.1, Human resource development for implementing collaborative TB/HIV activities), on the exercise (Document 11.2, Introduction to the exercise for Unit 11) and on the handout (Document 11.3: Human resources for collaborative TB/HIV activities: training and staffing) and discuss any possible problems arising from them.
- Ask the assigned trainee and the others to comment on the discussion component of the unit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the unit.

Answer any questions about the content of Unit 11 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 12: Monitoring and evaluating the implementation of collaborative TB/HIV activities.

Session 18

Unit 12: Monitoring and evaluating the implementation of collaborative TB/HIV activities

Review of the management of the unit

Refer to the guidelines in Unit 12 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 12 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Ask the assigned trainee and the others to comment on the presentation (Document 12.1, Monitoring and evaluating the implementation of collaborative

TB/HIV activities) and on the exercise (Document 12.2, Introduction to the exercise for Unit 12) and discuss any possible problems arising from them.

- Ask the assigned trainee and the others to comment on the discussion component of the unit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the unit.

Answer any questions about the content of Unit 8 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 13: Costing and budgeting for the implementation of collaborative TB/HIV activities.

Session 19

Unit 13: Costing and budgeting for the implementation of collaborative TB/HIV activities

Review of the management of the unit

Refer to the guidelines in Unit 13 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 13 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Ask the assigned trainee and the others to comment on the presentation (Document 13.1, Costing and budgeting for the implementation of collaborative TB/HIV activities) and on the exercise (Document 13.3, Introduction to the exercise for Unit 13) and discuss any possible problems arising from them. Remind them that, if a computer and video-projector are available, a file with the exercise is available in the CD of the training package (Document 13.2: Costing and budgeting for the implementation of collaborative TB/HIV activities).
- Ask the assigned trainee and the others to comment on the discussion component of the unit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the unit.

Answer any questions about the content of Unit 13 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 14: Case study on delivering services for TB and HIV/AIDS – the example of Malawi.

Session 20

Unit 14: Case study on delivering services for TB and HIV/AIDS – the example of Malawi

Review of the management of the unit

Refer to the guidelines in Unit 14 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 14 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Ask the assigned trainee and the others to comment on the presentation (Document 14.1, Malawi country experience) and discuss any possible problems arising from it.
- Ask the assigned trainee and the others to comment on the discussion component of the unit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the unit.

Answer any questions about the content of Unit 14 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 15: Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS.

Session 21

Unit 15: Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS

Review of the management of the unit

Refer to the guidelines in Unit 15 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 15 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Ask the assigned trainee and the others to comment on the presentation on the site of the visit and on the checklist (Document 15.1, Checklist for the field visit).
- The checklist enables course participants to follow each step of the visit, to formulate adequate questions while visiting the health service selected and to keep valuable information for the plenary discussion. Discuss any possible problems arising from it.
- Ask the assigned trainee and the others to comment on the discussion component of the unit.
- Finally, ask the assigned trainee and the others to comment on how to summarize the unit.

Answer any questions about the content of Unit 15 or the procedures for conducting it.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 16: Individual finalization of plans for implementing collaborative TB/HIV activities.

Session 22

Unit 16: Individual finalization of plans for implementing collaborative TB/HIV activities

Review of the management of the unit

Refer to the guidelines in Unit 16 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 16 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Discuss with trainees how to assist participants and how to manage possible questions.
- Remind trainees that participants have three hours to finalize their plans.

Proceed directly to Unit 17: Discussion of plans for implementing collaborative TB/HIV activities.

Session 23

Unit 17: Discussion of plans for implementing collaborative TB/HIV activities

Review of the management of the unit

Refer to the guidelines in Unit 17 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 17 of the facilitator guide, ask the assigned trainee and the others whether there are any problems or questions related to introducing the unit.
- Remind trainees that they will be asked to select two participants to present and discuss their plans.
- Plans will be presented using transparencies or, if available, a PowerPoint presentation (an electronic version of the plan).
- Discuss how to lead the plenary discussion in Unit 17, being careful to use good facilitator techniques and to follow the steps in the facilitator guide.
- Remind trainees that plans can be discussed taking into consideration the criteria used for evaluating them (Document 17.1, participants' manual).

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to Unit 18: Course evaluation.

Session 24

Unit 18: Course evaluation

Review of the management of the unit

Refer to the guidelines in Unit 18 of the facilitator guide and remind trainees which set of procedures will be followed during the course.

- Following the guidelines in Unit 18 of the facilitator guide, ask the assigned trainee (you will be probably in charge of it) and the others whether there are any problems or questions related to introducing the unit.
- Remind trainees to encourage participants to fill out the course evaluation forms (Document 1.2/18.1, participants' manual) as recommended.
- Discuss how to lead a discussion following the steps in the facilitator guide.
- Remind trainees that the course evaluation forms (Document 1.2/18.1, participants' manual) should be reviewed briefly before starting the discussion.

Remember to keep track of assignments on the practice assignment grid.

Proceed directly to the concluding session.

Session 25

Concluding session

A. *Discussion of any remaining problems*

The concluding session is the opportunity to comprehensively discuss any remaining problems.

B. *Practical arrangements for the course*

Give facilitators the written schedule for the course.

Inform facilitators that lists of the participants in each group will be prepared on the first morning as soon as participants have registered. Facilitators will be given a copy of the course registration form for each participant in their groups.

Tell facilitators which classrooms they will use for the various course activities. Tell them when and where they can obtain the course materials for their group or when the materials will be delivered to their classrooms. Tell them when they can go to their classrooms to arrange the tables, chairs and materials.

Remind facilitators to discuss how they will coordinate among themselves the work for the first few sessions as a team.

Tell facilitators whom to contact if they need extra supplies or materials during the course.

Remind facilitators where the overhead projector(s) or video-projectors will be stored or kept during the course.

Answer any questions about practical arrangements.

C. *Closing remarks to facilitators*

Tell facilitators when and where the daily facilitator meetings will be held. Explain the objectives of these brief meetings, which are:

- to assess progress made by each participant, identify any problems and agree on action to solve each problem;

- to discuss techniques that some facilitators found useful and that can be recommended to others (for example, techniques for leading a group discussion, giving a presentation or leading the plenary discussion);
- to prepare for the next day (for example, reviewing points to be emphasized in units, preparing for the field visit or discussing any modifications that may be needed in the schedule); and
- to decide on any necessary administrative announcements.

Tell facilitators that their schedule will be busy. Encourage informal discussions to be held after class hours (for example, to discuss the practical applications of the course content, potential problems or other ideas related to the course). Ask facilitators to suggest ways, times and places that such informal discussions can take place.

As the end-of-course evaluation questionnaire will be used (Course evaluation form, Document 1.2/18.1), tell facilitators to use all opportunities to encourage participants to fill the appropriate section when each unit is completed. The purpose is to avoid participants filling out the entire course evaluation form at the end of the course, potentially forgetting the details of each unit.

Thank the facilitators for their hard work. Tell them that they will receive certificates along with the course participants at the end of the course.

D. Facilitators discuss plans for the first day and arrange classroom

Encourage co-facilitators (when applicable) to take time to plan together for the first day of the course and to set up the classroom and the other rooms as needed.

Practice assignment grid

(Enter the name of the unit and the exercise in which each facilitator trainee practises each skill.)

Names of facilitator trainees	Introducing unit	Giving presentation	Introducing exercise	Managing plenary discussion	Summarizing unit

3.4 Overhead transparencies for the opening session

To prepare overhead transparencies to accompany the opening session of the facilitator training, photocopy the following eight pages onto transparency film.

Slides for the initial meeting of facilitator training



TB/HIV course for managers at the national and subnational levels

Slide 1

Review of the purpose of the course

- Overall goal of the training course: to further develop the necessary skills to plan and implement collaborative TB/HIV activities, based on the WHO-recommended strategies for controlling TB and HIV/AIDS. The objectives of the course are:
 - to analyse data on the key components of national TB control programmes and national HIV/AIDS programmes;
 - to identify gaps and priorities in TB/HIV collaboration and propose solutions to facilitate the implementation of collaborative TB/HIV activities; and
 - to prepare a plan for implementing collaborative TB/HIV activities.
- The course does not teach the clinical skills and knowledge needed to detect and treat cases of TB or HIV/AIDS at the health facility level.

Slide 2

Context of facilitator training

- Participants will be TB and HIV managers operating at a national or subnational level who are responsible for planning, organizing, implementing and evaluating activities of TB control programmes and/or HIV/AIDS programmes
- [Number] facilitators and [number] participants
- Facilitators assist participants in learning how to implement collaborative TB/HIV activities
- The course consists of 18 units
- Facilitator training: three days

Slide 3

Materials needed

- Manual for participants
(set of 18 units with slides)
- Guide for facilitators
- CD with all course materials

Slide 4

Objectives of facilitator training

- To learn the course content
- To practise the teaching techniques used with the units: for example, introducing a unit, giving a presentation, leading plenary discussions and answering questions and summarizing units
- To learn ways to work effectively with a co-facilitator
- To practise communicating in supportive ways that reinforce learning
- To discuss problems that may arise during the course (for example, slower readers, logistical difficulties, or sections of a unit that may be difficult to teach) and prepare to handle these problems

Slide 5

Teaching methods

Based on assumptions about learning:

- *Instruction should be performance-based*
- *Active participation increases learning*
- *Learning improves when instruction is individualized*
- *Positive motivation is essential if learning is to take place*

Slide 6

Schedule for facilitator training

- Facilitator training is 3 days
- The course is 5.5 days
- Facilitator training will:
 - move quickly through modules
 - focus mainly on teaching techniques
 - include practice in teaching techniques

Duties of a facilitator

- To introduce the units
- To give a presentation
- To assist participants while they work in groups
- To lead plenary discussions and answer questions
- To demonstrate or explain certain steps
- To supervise the field visit
- To assist participants while they draft the plans for implementing collaborative TB/HIV activities

Slide 8

Facilitator guide

- Checklists of instructional materials and supplies needed (in the introduction to the guide for facilitators)
- Guidelines for all modules following the introduction to the guide for facilitators
- List of procedures for each unit
- Notes for each step of the procedure

4. Directing the course

4.1 Suggestions for opening remarks to participants

As course director, you will have to make some opening remarks to all participants, probably during an opening ceremony. Your remarks should be general, perhaps focusing on the importance of collaborative TB and HIV activities in the country or region and the role of this course in improving their implementation. You may wish to adapt the following outline:

- welcome and introductions;
- statement of the need for and importance of the course and further plans for use of the course;
- key characteristics of the course:
 - this course may be rather different from many you have attended since you will actually practise the skills being taught;
 - you will be working in small groups as well as individually; plenary discussion sessions are also frequently planned;
 - the course will be hard work but will be equally rewarding, since you will learn or improve skills that you can actually use on the job when you return home;
- announcements about the schedule, posting of group assignments, etc.

4.2 Supervision of facilitators

As course director, you should supervise facilitators by observing them during the plenary sessions, leading group work and providing individual feedback on the participant's plan.

Some key points to help you in this process are:

- Be present during presentations and plenary discussion sessions.
- Visit each group during group sessions.
- When you are observing facilitators, refer to the performance criteria for facilitators listed on the next page. Use the appropriate section(s) of the list for the activity that is underway. For example, if they are having a plenary discussion, refer to the sections entitled "Facilitator technique: leading a plenary discussion".
- The performance criteria are not intended to be used as a report card for the facilitators but as a aid for making your observations and providing feedback. You do not need to mark on the list for each facilitator; simply keep it in front of you as you make your observations. After you assist in plenary sessions or your visit to each group, make notes on things the facilitators were doing well and things that could be improved. You may give feedback to a facilitator privately or, if the feedback applies to a number of facilitators, in the daily facilitator meeting. Be careful never to embarrass facilitators by correcting them in front of participants.

- Ensure that the facilitators are mentioning all the major points of each module specified in the facilitator guide.

4.3 Performance criteria for facilitators

When observing facilitators working, refer to this list as a reminder of appropriate facilitator techniques for the activity observed.

- 1. Facilitator technique: working in team with other facilitators (when applicable)**
 - a. Shares the work on each unit in an organized way (each facilitator has a role in the presentation, exercise, discussion, etc.)
 - b. Is flexible and able to adjust the role as needed
 - c. Is polite and respectful when making comments or suggestions while the other facilitator is leading
 - d. When leading, invites other facilitators to participate by adding comments or an opinion
- 2. Facilitator technique: introducing a unit**
 - a. Keeps introductions brief
 - b. Includes all points mentioned in the facilitator guide
- 3. Facilitator technique: giving a presentation and introducing the exercise (when applicable)**
 - a. Shows enthusiasm for the topic covered
 - b. Delivers the presentation clearly, keeping it brief and clearly introducing the exercise
 - c. Ensures that each participant understands the key messages of the presentation or exercise
 - d. Keeps the presentation interactive
 - e. Includes all the points mentioned in the facilitator guide
- 4. Facilitator technique: leading the plenary discussion, answering questions and summarizing the unit**
 - a. Sets up the discussion by explaining its purpose and how it will proceed
 - b. Involves all participants in the discussion
 - c. Reinforces participants by thanking them for comments, praising good ideas, etc.
 - d. Handles incorrect or irrelevant comments from participants tactfully
 - e. Asks questions to keep the discussion active and on track
 - f. Responds adequately to unexpected questions; offers to seek answers if not known
 - g. Records ideas on the flipchart in a clear, useful manner
 - h. Includes points listed in the facilitator guide
 - i. At the end of the discussion, summarizes the major points

- j. At the end of the unit, summarizes the unit as recommended in the facilitator guide

5. Facilitator technique: individual feedback on the participant's plan

- a. Sits privately with the participant to give feedback
- b. Checks plans carefully; listens as participant discusses reasons for including the given activities, indicators and budgets
- c. Encourages and reinforces participant's efforts; acknowledges the plan's strengths
- d. Helps the participant to understand any weaknesses; gives clear explanations
- e. When appropriate, asks questions about the participant's setting and the participant's opportunities to implement the planned activities

6. Facilitator technique: general behaviour

- a. Looks available, interested and willing to help; has materials organized before managing a unit
- b. Encourages questions
- c. Watches participants as they work
- d. Offers individual help to participants who appear confused

4.4 Conducting daily facilitator meetings

Facilitator meetings are usually conducted for about 30–45 minutes at the end of each day. Facilitators could be tired, so try to keep the meetings brief.

- Begin the meeting by asking facilitators to describe progress made, to identify any problems impeding progress and to identify any skill or any section of the units that participants found especially difficult to do or understand.
- Identify solutions to any problems related to any particular participant's progress or related to difficult skills or sections of the units.
- Discuss teaching techniques that the facilitators have found to be successful.
- Provide feedback to the facilitators on their performance. Use the notes that you have taken while observing them during the day.
 - Mention a few specific actions that were done well (for example, leading plenary discussion; making all the major points listed in the facilitator guide).
 - Mention a few actions that might be done better (for example, keeping introduction to the unit and presentation shorter; review any major points of the last module before introducing the next module).
- Remind facilitators of certain actions that you consider important for them to undertake:
 - Discuss problems with a co-facilitator. If co-facilitators cannot solve problems together, go to the course director, who may be able to deal with these situations.
 - Speak softly when giving feedback on the plans to avoid disturbing others. Put chairs in the hall so that a participant and a facilitator can talk without disturbing others during their work.
 - Always be open to questions. Try to answer immediately, but if a question takes too long to answer, or is not relevant at the moment, suggest that the

discussion be continued later (for example, during free time, at the coffee break). If a question will be answered later in the course, explain this. If you are unsure of the answer to a question, offer to ask someone else and then come back later with an explanation.

- Interact informally with participants outside scheduled class meetings.
- For participants who have difficulty in following the course content, do not intervene in discussions and/or are slow in performing the exercises, the facilitators should:
 - * avoid answering exercises for them
 - * reinforce small successes
 - * be patient (or ask another facilitator to help).
- Review important points related to the unit(s) for the next day.
- Remind the facilitators to consult the facilitator guide and collect any supplies needed for the next day.
- Make any necessary administrative announcements (for example, location of supplies, room changes, transport arrangements, etc.).
- After a few days, ask facilitators to point out to you any participants who might be good candidates for facilitator training. These would be participants who:
 - easily understand the units
 - communicate clearly
 - help others and work well with others in their group
 - participate confidently in discussions.

4.5 Collecting data during the course

This guide provides several possible forms for collecting data during the course. These forms are just suggestions. Other forms may be developed for other needs. The forms suggested in this guide and presented in the following pages are:

- course registration form – completed by participants at registration on the first morning of the course;
- summary participant list – summary completed by an administrative assistant based on registration data; and
- course director summary – completed by the course director at the end of the course based on the data collected day by day. Includes information on the total numbers of participants and facilitators, on the participants' completion of each unit, etc. This information is useful for monitoring the numbers of facilitators and participants trained and for ensuring that the course is being given as planned and not altered or shortened unacceptably. This summary could be sent to the TB and HIV/AIDS programmes and sponsoring agencies if required.

Course registration form

Management of collaborative TB/HIV activities: training for managers at the national and subnational levels

Please print clearly.

Your name: _____

Name and address of office
where you work: _____

E- mail address(es): _____

Telephone number(s): _____

What is your current work position or job title?

What are your current duties related to TB and/or HIV/AIDS control activities?

What medical, nursing or other health training have you received (either in school or in relation to your job)?

What year did you finish your basic medical, nursing or other health training? _____

Have you participated in any training related to TB and/or HIV/AIDS control? If so, please give the course name and the year you participated.

Summary participant list

Management of collaborative TB/HIV activities: training for managers at the national and subnational levels

Dates of the course: _____

Venue of the course: _____

Name	Current position or job title	Name of your region and/or district	Contact details: mailing address, telephone number, e-mail

Course director summary

Management of collaborative TB/HIV activities: training for managers at the national and subnational levels

Dates and venue of the course: _____

Facilitator training or briefing (if applicable):

Dates of facilitator training or briefing: ___/___/___ – ___/___/___

Number of facilitators trained or briefed: ____*

Course:

Dates of course: ___/___/___ – ___/___/___

Total number of days: _____

Total number of hours of the course (including the field visit): _____

Number of participants: _____

Units completed	Tick (X) if all participants completed:	If not all, indicate the number who completed:
Introduction to the course		
How to prepare a plan for implementing collaborative TB/HIV activities		
Epidemiology		
Principles for controlling TB and HIV/AIDS		
The DOTS strategy for controlling TB		
Clinical management of TB		
Universal access to antiretroviral therapy		
Clinical management of HIV/AIDS		
Drug management for controlling TB and HIV/AIDS		
The interim policy on collaborative TB/HIV activities		
Recording and reporting for the implementation of collaborative TB/HIV activities		
Surveillance of HIV prevalence among people with TB disease		
Human resource development for implementing collaborative TB/HIV activities		

Monitoring and evaluating the implementation of collaborative TB/HIV activities		
Costing and budgeting for the implementation of collaborative TB/HIV activities		
Case study on delivering services for TB and HIV/AIDS – the example of Malawi		
Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS		
Individual finalization of plans for implementing collaborative TB/HIV activities		
Discussion of plans for implementing collaborative TB/HIV activities		
Course evaluation		

***Number of facilitators at the course:** _____ If different from the number trained above, please explain:

Ratio of facilitators to participants: 1 to _____

Course director's comments and observations (on the reverse side, please comment on administrative issues, problems and how you solved them, constructive suggestions for future courses, etc.)

Optional attachments:

Agenda (if modified) and list of participants and facilitators

4.6 End-of-course evaluation

You may wish to use an evaluation questionnaire to determine participants' opinions at the conclusion of the course. The following pages show a sample course evaluation form. Review and revise this questionnaire as necessary to ensure that it is appropriate for evaluating the course as it has been conducted. If you decide to change it, remember to change it in the participants' manual (Document 1.2/18.1).

You may wish to add or delete specific questions. If you make such revisions, remember:

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

Note that the questionnaire will only summarize participants' opinions and feelings about the course. It will not evaluate the skills and knowledge participants learned. Facilitators evaluate how well participants learn the skills and knowledge on an ongoing qualitative basis throughout the course, by assessing participants' work on written exercises and in plenary discussions. If a course director wishes to evaluate the skills and knowledge learned at the end of the course quantitatively, another evaluation instrument will need to be developed. One possibility is to compile the self-assessment questions from the end of each module and use them as a final "test" to be taken by each participant.

Course evaluation form

Management of collaborative TB/HIV activities: training for managers at the national and subnational levels

1. Please rate the quality of the training course by ticking the appropriate answer:

	Excellent	Good	Fair	Poor
Overall course				
Matching your needs as a TB/HIV manager				
Presentations				
Playing games				
Exercises				
Training materials				
Accommodation				
Meals				
Transport				
Psychosocial activities				
Administrative support before the course				
Administrative support during the course				
Venue				

Comments:

2. What did you like best about the training course?

3. What did you like least about the training course?

4. Should anything else be included in future training courses for TB/HIV managers?

5. Should anything on the agenda for this course be taken out for future training courses

6. Please rate the usefulness of each course unit with regard to developing the necessary skills as a TB/HIV manager.

Course unit	Very useful	Useful	Somewhat useful	Not useful
Unit 1: Introduction to the course				
Unit 2: How to prepare a plan for implementing collaborative TB/HIV activities				
Unit 3: Epidemiology				
Unit 4: Principles for controlling TB and HIV/AIDS				
Unit 5, part 1: The DOTS strategy for controlling TB				
Unit 5, part 2: Clinical management of TB				
Unit 6, part 1: Universal access to antiretroviral therapy				
Unit 6, part 2: Clinical management of HIV/AIDS				
Unit 7: Drug management for controlling TB and HIV/AIDS				
Unit 8: The interim policy on collaborative TB/HIV activities				
Unit 9: Recording and reporting for the implementation of collaborative TB/HIV activities				
Unit 10: Surveillance of HIV prevalence among people with TB disease				
Unit 11: Human resource development for implementing collaborative TB/HIV activities				

Unit 12: Monitoring and evaluating the implementation of collaborative TB/HIV activities				
Unit 13: Costing and budgeting for the implementation of collaborative TB/HIV activities				
Unit 14: Case study on delivering services for TB and HIV/AIDS – the example of Malawi				
Unit 15: Field visit to a local health facility providing preventive, diagnostic and treatment services for TB and HIV/AIDS				
Unit 16: Individual finalization of plans for implementing collaborative TB/HIV activities				
Unit 17: Discussion of plans for implementing collaborative TB/HIV activities				
Unit 18: Course evaluation				

7. Use the space below to complement any previous response and/or to provide any suggestions you may have to further improve the course.

Thank you!

4.7 Closing session

During the closing session, review the highlights of the course. You may include any important points that have been raised during the course.

Explain that participants should begin using the skills and knowledge taught in this course when they return to their workplace at the national or regional level to complement and implement the plan they have developed. If they encounter difficulty, they should seek advice or help from trained colleagues and facilitators. Describe any help that may be available in the form of consultation, e-mail contacts, etc.

Present course photographs (if taken) and certificates to the participants and facilitators and congratulate them on their hard work.