Training in TB prevalence surveys

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Importance of training

- Standardised procedures
- Specific survey conditions
- Training of all team members
- Team building
Set up of training

- Training by whom for whom?
- Timing of training
- Generic training module:
  - Team composition (survey & central)
  - 5 day format (example)
  - General outline to be adapted by countries
  - Interactive training – learning by doing
  - Module will be available via KNCV & WHO taskforce website
## Central team

<table>
<thead>
<tr>
<th>Survey team</th>
<th>Sub team</th>
<th>Key tasks</th>
<th>Modules</th>
<th>Specific content</th>
<th>Method</th>
</tr>
</thead>
</table>
| Central     | Survey coordinator        | Management               | A, D    | • Managerial skills  
              • Identification implementation problems  
              • Assessing monitoring reports  
              • Communication                  | Presentations         |
|             | Data management team      | Data entry               | A, E    | • Implementation data management plan  
              • Administration  
              • Identification inconsistencies  
              • Data entry, cleaning, and validation | Presentations         |
|             | Laboratory team           | QA of field lab          | A, B    | • Technical training  
              • Specimen handling, storage, and shipment  
              • Quality control measures            | Presentations         |
|             | X-ray team                | QA field x-ray Final     | A, C    | • Technical training  
              • Handling and storage large volume images  
              • Quality control measures          | Presentations         |
| Field | Team leaders | Management | A, I | • Managerial skills  
• Monitoring data collection  
• Identification inconsistencies  
• Administration | • Presentations  
• Discussions  
• Group work |
|------|--------------|------------|-----|-----------------------------------------------------------------|
| Field | Census team  | Census taking | A, F | • Ethics  
• Population selection  
• Interview techniques  
• administration | • Presentations  
• Practical exercises  
• Field visit |
| Field | Interview team | Interview taking | A, F | • Ethics  
• Population selection  
• Interview techniques  
• Administration | • Presentations  
• Practical exercises  
• Field visit |
| Field | Sputum team  | Sputum collection | A, H | • Technical training  
• Storage, packaging, and sending of specimens | • Presentations  
• Practical exercises |
| Field | Laboratory team | Microscopy  
Sample packaging | A, H | • Technical training  
• Storage, packaging, and sending of specimens  
• Microscopy in field conditions | • Presentations  
• Practical exercises |
| Field | X-ray team  | Screening x-ray | A, G | • Safety  
• Technical training  
• Storage and shipment images | • Presentations  
• Practical exercises |
Key modules

Module A: Introduction prevalence survey

- For all survey staff
- Rationale and design survey
- Role and responsibilities different teams
- Importance standardized data collection and role SOPs.
- Presentations, discussions, video, and group work.
Team specific modules

Central level team:

- **Module B: Central laboratory**: survey procedures, field QA and EQA
- **Module C: Central radiology**: survey procedures, field QA and EQA
- **Module D: Survey management**: survey coordinator with his/her members of the coordination team & formal monitoring team, management, problem solving, what if scenario’s
- **Module E: Data entry, cleaning and validation**: data manager and his team.
Field team

- **Module F**: Census taking and interviewing
- **Module G**: Field radiology
- **Module H**: Field sputum collection
- **Module I**: *Field data management*: intended for team leaders, monitoring of data collection, administration and problem solving, what if scenario’s
**Example:**

**Module F** Census taking & Interview

- Module F1 Ethics and procedures in household surveys
- Module F2 Census taking
- Module F3 Informed consent & Enrolment
- Module F4 Interviewing techniques
- Module F5 Practicing in dummy households
# Module F4 Interviewing techniques

| **Objectives** | By the end of this session participants:  
- Know how to approach households.  
- Are able to administer questionnaires.  
- Know the importance of checking questionnaires for completeness and consistency.  
- Fully understand the meaning of each question in the questionnaire.  
- Know and have practiced how to ask the questions. |
<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Training materials</strong></td>
<td>Transparencies/powerpoint presentation, flip chart, hand outs, copies of questionnaires for practicing,</td>
</tr>
<tr>
<td><strong>Responsible for training</strong></td>
<td>Survey coordinator/trainers from National Bureau of Statistics / TA</td>
</tr>
<tr>
<td><strong>Methodology</strong></td>
<td>Training by presentations, discussion and practical exercises.</td>
</tr>
<tr>
<td><strong>Number of participants</strong></td>
<td>Depends on number of field teams and number of interviewers per field team</td>
</tr>
<tr>
<td><strong>Timing</strong></td>
<td>During the general survey training for the fixed team members. Prior to field work in specific cluster for flexible team members.</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td>2 days</td>
</tr>
<tr>
<td><strong>Methodology</strong></td>
<td>Presentation, discussion, exercises, group work, role play</td>
</tr>
<tr>
<td><strong>Background materials</strong></td>
<td>Questionnaires, SOPs prevalence survey</td>
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Set up

1. Introduction *(welcome, explain the objectives etc)*
2. Overview of the tasks of the interview team
3. General interviewing technique and questionnaire administration *(timing, quality of the answers depends on how the questions are being asked, standardized procedures, important elements of asking questions (interpretation, deduction of information, there are no wrong answers). Whom to ask questions, how to ask questions, sensitive questions, medical advice & counselling.)*
4. Verifying if all eligible household members have been approached and interviewed
5. Understanding the questionnaires for the survey *(meaning of each questions, why are they asked)*
6. Checking the questionnaires for completeness and consistency
7. Practicing the questionnaires administration *(small groups, practice all procedures, discuss difficulties)*
8. Wrap up discussion & assessment
# Module F5 Practicing in dummy households

<table>
<thead>
<tr>
<th>Objectives</th>
<th>By the end of this session participants will:</th>
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<tbody>
<tr>
<td></td>
<td>- Have practiced taking census in testing households.</td>
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<tr>
<td></td>
<td>- Have practiced taking questionnaires in testing households.</td>
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<td>- Be ready to start with the pilot survey.</td>
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<table>
<thead>
<tr>
<th>Training materials</th>
<th>Copies of census registers, informed consent and questionnaires, ‘dummy households’ for practicing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsible for training</td>
<td>Prevalence survey coordinator</td>
</tr>
<tr>
<td>Methodology</td>
<td>Field practical</td>
</tr>
<tr>
<td>Number of participants</td>
<td>Depends on number of field teams and number of interviewers per field team</td>
</tr>
<tr>
<td>Timing</td>
<td>During the general survey training for the fixed team members.</td>
</tr>
<tr>
<td>Duration</td>
<td>0.5 day</td>
</tr>
<tr>
<td>Background materials</td>
<td>Registers, Questionnaires, SOPs prevalence survey</td>
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</table>
Set up

1. **Introduction to practicing in dummy households**

2. **Practice**
   - small subgroups (2-4 persons)
   - each subgroup visits 2 ‘dummy households’ and performs the interview; divide different sections of the interview between the members of the subgroup.
   - accompanied by a facilitator who observes, does not interfere unless gross misconduct.
   - conduct interviews as if for real. introduction, census taking, asking for consent, issuing the questionnaire, thanking the respondents for their participation, checking the questionnaire for completion etc.

3. **Feedback**
   - observations made by the facilitators (positive and/or negative), experiences of the surveyors (what was difficult, different then expected etc)
   - based on the training session and the testing exercise, the facilitators assess if all surveyors are qualified to start the survey.
Training – what is key

- Importance of practice – learning while doing
- Standardized methods
- Assessment – ready to start, need for more training, recruit additional persons
- Teambuilding starts at training
Pakistan training – experience to share

- Different level of audience
- Make messages very clear
- Harmony & teambuilding effort (people have not met)
- Create open and frank atmosphere
- Refresher after changes in SOPs
- Development training modules took 2-3 months
Thank you