Suggestions for How to Plan and Present Your Training

Facilitator Training Guide for the Surveillance Curriculum

May, 2007

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Introduction to the Surveillance Curriculum and the Facilitator Guide

Primary Goal

The primary goal of the surveillance curriculum is to improve training for HIV/AIDS and sexually transmitted infections (STI) surveillance activities.

This training guide provides general information on how to adapt the surveillance curriculum and put on an HIV/AIDS/STI surveillance course in your country.

Important: Adaptation is needed because the surveillance curriculum covers far more information than is needed for any one country.

You will just be using what is of value to you and your country. This guide explains how to adapt the curriculum.

Not covered or mentioned only briefly are other very important aspects, such as how to:

- analyse training needs
- design an entirely new course
- conduct in-depth monitoring and evaluation.

Intended audience

Use the surveillance curriculum as a resource for training staff engaged in district, regional/provincial and national public health surveillance of HIV, AIDS and STI surveillance activities. These materials may be used in any country or region where AIDS, HIV and STI surveillance is conducted.

The training modules and courses are workbooks, not textbooks.

The surveillance modules and courses:

- employ case studies, exercises, discussions, small group sessions and presentations. Some of these activities may not be appropriate in your setting.
- focus on developing protocols, operations manuals, processes and action plans for surveillance activities in your country.

Description of materials

The courses/modules:

- introduce participants to the theory and practice of public health surveillance

- describe the practice of public health surveillance for HIV/AIDS and STI

- provide several levels of data processing training:
  - a brief practical overview of data collection, analysis and reporting
  - or a one week Electronic Data Processing, Analysis and Reporting course for data managers.

- describe the dissemination of public health surveillance data

- describe how to use behavioural surveillance techniques, including:
  - the latest in sampling methods
  - in-depth information on high-risk groups
  - field-based information on conducting respondent driven and time-location sampling studies.

- present new surveillance approaches for recent infections and determining HIV drug resistance.

Surveillance Facilitator Information and Materials

Who should facilitate?

Course facilitators should be experienced, senior-level public health officials from the country or region where HIV/AIDS and STI surveillance activities are routinely conducted. They should:

- have a comprehensive understanding of public health surveillance, especially HIV/AIDS and STI surveillance
- understand the "real world" obstacles and challenges of implementing and executing HIV/AIDS and STI surveillance in their specific region or country
- understand and practice the teaching techniques and approaches that will fit their audience best.

Additional experience is needed to present the field-based courses for respondent driven and time-location sampling, recent infections and HIV drug resistance.

For Electronic Data Processing, Analysis and Reporting on HIV Surveys, facilitators should be expert in the use of Epi Info software for data processing, analysis and reporting of surveillance data.

What's in the training guide?

This training guide was developed to help facilitators and training planners at all levels in planning training events. It includes:

- scheduling suggestions
- ideas for what to include in the training
- planning tips and checklists
- adult education training and presentation tips.

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Unit 1: How to Use the Modules and Courses

What is not covered

This training guide does not consider some very important preliminary steps. We are making an assumption that you have already:

- identified the lead agency and stakeholders who will need to approve the training materials, timeline, agenda and budget
- identified the persons(s) who will undertake the adaptation of the materials (if any) in your organization or assisted by other organizations
- conducted a needs assessment to determine:
  - if training is needed
  - who needs it
  - what, exactly, is needed.

If you require training technical assistance in these crucial preliminary steps, please contact your local CDC office or WHO regional office so that we may discuss ways to help you.

There is a little information and some worksheets later about conducting a training analysis: questions to ask about your audience and environment. Once you have decided to put on a course, these analysis questions will help you to plan and adapt materials.

Course/Module/Workshop Contents

The modules, courses and workshops are composed of units and have a uniform format and content, shown in Figure 1.1. Each unit contains information as text, graphics, tables and graphs. The units help participants get involved in the course or workshop by providing several kinds of questions and activities.

Warm up questions

The warm up questions are an *ungraded pre-test*.

- Two questions are provided for each unit objective. Studies have shown that pre-testing used in this way focuses participant reading on the most important information.
- Answers to the questions are easily found in the content of the unit and should be heard during lectures.
- Participants are given time at the end of the unit to look over their answers and change them based on their new knowledge.

- The participants may discuss the questions in class, especially the questions that were difficult or confusing.
- Answers to the warm up questions are provided in the Participant Manual, Appendix D.

Discussion questions

In some of the modules and courses, discussion questions are provided after each graphic or table. These were added to make participants look at, interpret and discuss the table or graphic.

- These are class discussion questions.
- You can use them or not but they provide an easy way for you to know if the participants understand the content (of course this may not be necessary for your audience).
- No answers are provided. We make the assumption that the facilitator will not need the answers to interpret the charts, tables and graphs.

Small group discussion questions

Small group discussion questions at the end of the unit help participants think about the information in terms of their own locale.

- The small group questions concern the content of the unit and ask the participants to discuss their regional approach or statistics.
- A moderator/leader keeps the discussion moving.
- A scribe keeps notes.
- A speaker reports back to the class.

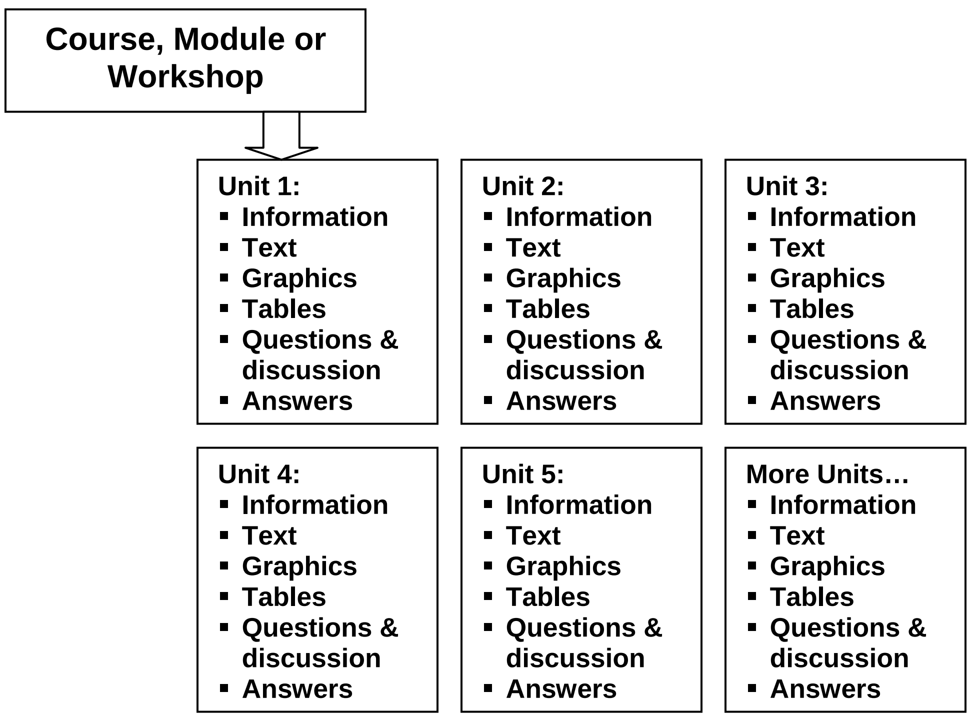
- Since the answers are dependent on the location being considered, no answer key is provided in the manuals.
- These are good questions for class discussion.

Case study

Case studies at the end of each unit help participants apply the new information. Answers are provided in the Participant Manual Appendix D.

Take the course or module apart and just use the units or pages that apply to your country or region.

Figure 1.1. What is in a Course, Module or Workshop?



Frequently Asked Question: May we change the questions or case studies?

Answer: Yes! Change them to fit your country or region. We provided generic questions to save you time but you do not have to use them.

Think about Your Local or Country Needs

Depending on your local and country needs, the courses and modules can be used in a number of ways. Think about your needs as you look at the list of suggestions below.

- The introductory course is composed of four core modules that can be:
  - presented together as a week-long pre-service training event for people new to surveillance in your country or region
  - used as a refresher course for those who have not been formally trained
  - used in public health education or a university programme.

- Later modules can be used instead of one or more of the core modules. For example:

  - you could present Module 1, the Overview module with Module 5, Behavioural Surveillance.
  - This would give participants the overall picture of HIV/AIDS globally and locally, then introduce them to behavioural surveillance as a way to conduct studies/collect data.

- For a shorter training event, you could present just one of the modules (the Surveillance Curriculum on the previous pages shows the approximate amount of time to allow for each module).

- For a team training, regional meeting or capacity building workshop, you may want to pull several units that are very meaningful for your audience from a module and use them. It would be possible to do short trainings and, over time, cover all the material that is relevant to your setting but still avoid pulling staff off the job for too long each time.

- You may want to copy a table or procedural steps to provide a job aid that your participants can use later back on the job.

- Finally, the modules can be used for self-study.
  - The materials have been developed in a 'workbook' style that participants can do on their own.
  - You would then want to bring everyone together to discuss the materials or test them on what they need to know on the job.
  - You would also want to follow up with observation on the job.
  - If used this way, it is best to start with Module 1, the overview module, as an introduction.

Common format

We used a consistent format when we developed the modules and courses. We did this to make it easier for you to adapt the information for your country or region. Copy and paste from several modules or courses. You will need very little time to make your new course consistent and professional looking. The next unit of this guide describes how to adapt the curriculum to your country's needs.

What the Participants Will Do

If a class is held on the pre-service (or for experienced staff who are moving into HIV/AIDS work on the job or staff you have never been trained) Modules 1 through 4, we suggest that the participants:

- Try the warm-up questions at the beginning of each unit
- Read the text in the modules and answer the questions in the module or participate in an interactive lecture with discussion
- Review the warm-up questions
- Meet in small groups to discuss the end of module exercises
- Discuss the case study at the end of the unit. Or have each person work on the case study individually then conduct a class discussion.

Reviewing the questions

Each module provides answers for the warm up questions and case studies. Answers are not provided for the class discussion questions on graphics and tables or the small group questions; most of these questions ask for specifics of participants' country. These are designed to stimulate small group discussion.

Additional information

Most of the modules or courses have several appendices you may want to provide at your training even if you don't present the full module or course:

Appendix A, References and Further Reading Material
Appendix B, Glossary and Acronyms
Appendix C, Useful Links
Appendix D, Answers to Warm Up Questions, Case Studies

Other courses and modules have special appendices that only apply to that course or module.

Your Time and Budget

No Ministry of Health has the time or resources to present all available information on surveillance or any other subject. Healthcare systems typically don't have the resources to spare the absence of several surveillance officers or MOH staff for weeks or months at a time.

Cut down the information to be covered. Do an *assessment* to decide where the need is greatest and what will benefit the most surveillance officers/healthcare workers.

Table 1.1. Assessment: Do you need a training course or workshop?

Question	Example or Related	Comment
Are there problems or issues that can be addressed in training? (Remember that some problems can't be solved by training.)	Healthcare workers are unhappy with their work environment so are coming late to work.	Training will not solve this; it will have to be addressed in another way by HR.
Are there new processes or procedures that staff need to know to do their jobs?	Your ANC Surveillance forms have changed.	Practice filling out the new forms when you conduct training before a surveillance round.
Who should be trained?	Same example: forms have changed	You will need to train everyone who may have to fill out the forms; don't train others who will never need to fill it out.
How often should they be trained?	Sentinel surveillance studies may only last for 3 months; at other sites, data collection is on-going.	Try to conduct training right before the surveillance round you are supporting.
What should be taught?	A great deal of information exists on how to conduct surveillance, how to handle specimens and so forth.	Limit what you cover to the essential, need-to-know on the job information. Usually for training events, you will be time-limited; working adults can only stay a brief time off the job.
What is a 'workable' training schedule?	Consider budget and how long workers can be off the job.	Find out what has been done in the past for similar training. What are the expectations of stakeholders, MOH, etc.

Who should make these decisions?	Talk to your supervisor about reviews and approval.	
How will you tell if the training had the desired impact?	For similar courses, is testing used? Observation back on the job?	There is no correlation between training test scores and performance back on the job. The best way to determine if the training had an impact is to observe after the training, back on the job.

For each course you hope to present, analyze your audience and the training environment before you decide what to present.

Analysing Training Needs

Analyse your audience

You probably already have some idea of what course is needed (by talking to your supervisor or others at the national or regional level or from national planning documents). Now collect as much information as possible about the participants who will attend to plan a training course that is meaningful. A sample assessment form is provided next page. Every situation is different. Think about the needs of your country when you modify the audience analysis to fit your situation and desired audience (you would do one form for each course unless you have exactly the same audience for two or more courses):

- What are the priority needs of your country?
- What are your national/regional goals?
- Who will approve the training materials/programme?
- Are there issues or problems that need to be addressed in the training?
- Is there a less costly way to address training needs than by bringing everyone together for a class? For example, could you use the materials as a workbook?

Table 1.2. Training Audience Analysis: Describe a "typical" participant who will attend the planned training.

Preliminary Title of This Course:

- *Once you have an idea of what is to be trained, talk to different people to get an idea of a typical participant.*
- *Talk to experts at several levels: national, state/regional, district.*

"Typical" Participant	Description	Source of Information*
What is participant's work background?		
Is participant new to the job or experienced?		
What level is the participant in the organization?		
How much education or training has participant received in this area?		
What does the participant do on the job? Is there a standard job description for his/her job?		

“Typical” Participant	Description	Source of Information*
Do you want to *train trainers* or will the participants just be expected to do their assigned jobs but not train other staff?		
What do you expect the participant to already know?		
Is the typical participant comfortable using a computer?		
Will the participant need to provide her/his own data for the course?		
Can you find out more about a “typical” participant’s expectations for the training?		
Additional information on “typical” participant:		

*Who gave you this information?

Analyse your environment

Now think about the training environment.

- Will the training be conducted in a hotel in the capital?
- Will you have all modern conveniences?
- Will participants need to bring a laptop or their regional or national data?
- Will the training be presented in areas where there's no electricity and no real classroom or conference setting (such as at clinics)?

Try to determine these "environmental" issues in advance.

Talk to the same people you interviewed before when you tried to discover more about the "typical" participant.

A sample table is provided next page for gathering data. Every situation is different. If you have never put on training before, find a "mentor" at your location or request assistance from your local CDC or WHO office.

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Table 1.3. Training Analysis, Course Environment: Describe where the training will take place for the planned course

Preliminary Title of This Course:

Talk to experienced people at several levels in your country to determine the training environment.

Environmental Element	Your Finding	Source of Information*
Where will the course be presented? List all possible locations.		
Will transportation to the training be needed for participants?		
Will accommodations be needed for participants if course is more than one day?		
Will training sites all have electricity?		
Will you be able to use slides or is there a better approach, such as posters or handouts?		
What approaches have been successful in the past at the proposed training sites?		

Environmental Element	Your Finding	Source of Information*
Will training sites have supplies and equipment (such as projector/ overhead, flipcharts, whiteboard, markers and so forth)		
Will you have access to office support (copying, email, binding, etc).		
Will participants have access to office support?		
If needed, will computers be available? Will participants need to bring a laptop?		
Will the participant need to provide her/his own data for the course?		
Who can help with booking details for sites?		
Additional information on "typical" training environment:		

*Who gave you this information?

Develop a training analysis

Develop a document that provides written plans that people can review and respond to. This is your recommendation for training: who, what, how long. Your finished analysis document should provide:

- the preliminary title of the training
- your completed tables (Table 1.2 and 1.3)
- a detailed description of the training that is a summary of the two long tables of information you collected about your audience and environment.

Review the analysis with your supervisor and others that need to approve it. Doing a training analysis gives you an idea of what to teach and how to teach it. When you know this, you can adapt the existing materials to fit your "typical" participants and the training environment.

Designing the Course

The Surveillance Curriculum is large. You can use pieces of it for a portion of your course but the curriculum provides far too much "generic" information for it all to be used in any one country. When you conduct training locally in a district or region, you will want to adapt the information to fit your situation or location. The curriculum is provided in MS Word and Powerpoint to make it easy to:

- copy and paste what you need
- delete what you don't need.

Important: It is better to reduce the amount of content and focus on what is directly applicable to the job. Studies have shown that adult learners are more likely to remember what they learned when you do this.

In the training analysis, we considered the audience and environment. Now look at the Materials Preparation table next page and answer the questions to help your planning.

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Table 1.4. Training materials preparation

Preliminary Title of This Course:

Considerations	Your Answer*	Comments
What are the proposed training dates?**		
How long should the course be (in hours or days)?		
How much time is available for preparing materials?**		
What staff are available to assist in adapting materials?**		
Who will do each part? Make a list of their names, what each will do and when it will be ready.**		
Who needs to review/approve the materials?**		
How much time will be needed for review? (Ask the reviewers)**		

Make a list of their names, what each will review and how long to allow.**		
How long will it take to print/xerox the final materials for the class?**		
Is adequate funding available for developing the materials planned?		
Additional considerations for your staff.		

*Interview knowledgeable people in your office, on your staff, at your local CDC or WHO offices

For longer projects, develop a draft timeline for development. Use the data you collected here. Use the possible training dates and work back.

Plan what to use

The quickest way to plan what to cover at your training is to have a meeting with your supervisor and other involved staff. If possible, invite stakeholders.

- When people have a chance to participate in the planning up front, there is much less chance that your materials or plans will be rejected later.
- Talk it out first to get a very good idea of what organizations in your country think should be included in the training. What are the key ideas and skills you must cover?

Process 1.1. How to identify existing materials you can use.

Step	Do this…
1	Read the description of each course in the Surveillance Curriculum (included in this guide in Unit 1).
2	Eliminate all the modules and courses that don't seem to have anything to do with your planned course.
3	Call a training meeting. Bring to the meeting: ▪ copies of the table of contents of the modules/courses that are left; bring a copy for each person attending the meeting; these are the modules you <u>may</u> use. ▪ one or two full copies of each manual you are considering using.
4	Review the table(s) of contents as a group. Place a check by any content that <u>sounds like</u> it fits your needs. People may want to take a quick look at the entire manual to determine this.
5	After the meeting, develop an outline of the topics you decided to use, in the order you want to use them.
6	Ask your supervisor and stakeholders to approve the outline of training before you continue developing materials.

Develop the materials

Process 1.2. Use the outline to develop your training manual.

Step	Do this…
1	When the outline is approved, copy and paste the content that was selected into your new manual.
2	Now adapt for your country. Add <u>only the information that is essential on the job</u> from your national/regional: ▪ programme descriptions ▪ policies ▪ protocols ▪ guidelines ▪ algorithms ▪ reports or data ▪ forms and so forth.
3	Continue to adapt: ▪ if you wish, change the small group or case study questions to address your national or local issues. ▪ delete whole sections or units that don't apply to your situation.
4	Reformat to match your existing training materials (see **Comments on format** after this table)
5	Submit the draft manual to your reviewers.
6	Call a meeting to review, discuss and decide on changes.
7	Make the required changes. *i. Continued next page*

8	Develop media, training/job aids: a. If you are using slides, o identify slides from the Surveillance Curriculum that match your content o copy the slides and adjust to fit your training. Or you can make new slides that are appropriate for your training. b. Use existing slides, manuals or protocols to develop posters or handouts. Add or delete information to match your new manual and what you will include in the training. c. Develop *job aids* that a participant can quickly look at back on the job to remind him/her what to do.

Figure 1.2 next page shows the Analyse-Design-Develop process.

Comments on format

Formatting a document is more than just "making it pretty." A great deal of reading research has been conducted on how the format affects a person's ability to read the document.

Here are a few tips on formatting training materials that can be applied to any document:

- Leave plenty of white space; don't crowd the page.
- Put titles to left and indent the text:
  - It is easier to read a shorter line of text.
  - The reader can scan down the side of the page to find what he/she is looking for quickly.
- Keep paragraphs short.
- Use graphics (charts, maps, tables) to break up the text.
- Break the text up by using subtitles (such as **Comments on format**), again so reader can scan to find something quickly.

Notes

Figure 1.2. Adapting Generic Materials to Local Needs: Analyze, Design, Develop

Analyse Needs

- Give course preliminary title
- Interview local experts to determine:
  - “typical” participant (your audience)
  - the training environment
- Determine who will review and approve the materials

Get approval or update your Analysis before you begin Design.

Design the Course

- Choose the modules or units that meet your training needs
- Develop an outline that shows how you plan to arrange the content
- Review, adjust objectives
- Plan testing and evaluation strategy
- Identify outcomes/products
- Describe or give samples of what you will develop

Get approval or update your Design before you begin Development.

Develop the Manual

- Cut and paste the identified modules/ units that match the approved outline
- Adapt to your national or regional needs using your protocols, guidelines, forms, etc.
- Submit for review
- Plan your training event logistics.

Get approval to continue

Frequently Asked Question: We don’t have time to Analyse and Design! Can’t we just skip this step and develop the course?

Answer: No. You may finish the course then have it rejected. Or your course may not fit the needs of the participants and you will not get the results you hoped for. Either way, you will have to develop the course all over again, possibly several times.

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How to Request Adaptation Assistance

Discuss your needs with local/regional support staff at the WHO regional office or CDC office. We are available to assist in country adaptation of materials. On request, we provide support when you are:

- conducting training needs assessments
- adapting materials for your country from the 'generic' materials
- conducting your first in-country surveillance training
- evaluating training or surveillance activities

Advance Planning

Depending on the length of the course and number of participants, you will need to plan **2 to 4 months** in advance. Some busy training sites need even more lead time. Other high priority events (such as health surveys or sentinel surveillance) may also affect your plans.

Putting on a course is quite a bit of work. Many of the items in the advance planning checklist that begins next page have already been discussed. As you look through the checklist, think through step by step what is needed.

- The checklist is a reminder/job aid for course organizers and facilitators of what needs to be done before and during the course.
- For your locale, you may have additional items to add to the list. Other items you will delete.
- Update the checklist with your country name, region, dates and so forth, add or delete items to fit your situation.
- Show it to your supervisor, your mentor, the local CDC or WHO office or others you will work with so everyone is in agreement.
- Print it and use to keep track of your training project.

Job Aid 1.1. Training Advance Planning

<table>
<tr><th colspan="2">Initial planning
(check as completed)</th></tr>
<tr><th>Check</th><th>Item</th></tr>
<tr><td></td><td>Get the support of the people and groups who would have interest in the training. Discuss your plans and ask in your meetings for ideas that will improve the training. Adjust your plans based on the meetings. Meet with any of these that are involved in your locale:

▪ Ministry of Health officials
▪ National AIDS Control Programme (it may have a different name in your country) officials
▪ Local Centers for Disease Control and Prevention (CDC) and Global AIDS Programme Office officials
▪ Officials or officers from the World Health Organisation’s regional offices
▪ Key Non-Governmental Organisation (NGO) representatives
▪ Others depending on your country or region.</td></tr>
<tr><td></td><td>Prepare the budget. Ask questions like these:

▪ Who will pay travel expenses if travel is needed?
▪ Who is paying for the participants’ lodging and per diem?
▪ Who will pay for meals and catering?
▪ Will you need to pay the facilitators’ lodging and per diem?
▪ Will you use a contractor to organize the training event?
▪ Will you need to rent equipment?
▪ How much will the venue cost?
▪ What supplies will you need? When training with partners, who will provide each item needed?</td></tr>
<tr><td></td><td>Select staff (facilitators, administrative staff) and training dates.

▪ Determine who is qualified, interested and available in either developing materials or facilitating or supporting.
▪ Meet or communicate with the facilitators to make sure that the training schedule agrees with their schedules.</td></tr>
</table>

	Pick site (city) and venue (hotel or conference centre). You may have multiple sites (such as a number of provinces or states). Consider: ▪ Convenience to the facilitators and participants ▪ Your budget ▪ Support at the location for training needs, especially if computers are required
	Conduct a training analysis. This was briefly described earlier.
	Adapt the generic Surveillance Curriculum you have selected and develop a draft agenda. Choice of modules or units will drive the schedule. The choice of what you plan to present depends on: ▪ Your budget ▪ Level and availability of the participants (participants may not be available for a week long event!) ▪ Training goals ▪ Availability of the facilitators Information on adaptation was provided earlier in this unit.
	Decide how you will evaluate the training. How will you know if the training was successful? Think about: ▪ Who will want to know if the training was successful? ▪ Will you need to develop a formal training report? ▪ Will you be tracking results of the training, such as test scores and the name and contact information of participants? ▪ Will you follow up to see if the training affected performance? This is the best kind of evaluation but takes the most time.
	Determine how many participants you want to invite and what kind of background they should have. Then advertise the course and sign up participants: ▪ Go back to the groups you talked to originally: Ministry of Health, National AIDS Control Programme, key NGOs, local CDC and Global AIDS Programme Office, WHO regional office. Tell them about the course and ask them to alert possible participants. There will be a local protocol to follow for inviting participants. Find out what it is. ▪ As participants are approved, you may need a letter of invitation to formally invite them. ▪ Tell participants if you want them to bring something to the training. For example, you may want them to bring their district or national HIV/AIDS

	data or data on the impact of HIV/AIDS on their local community. Ask them to fax these data in advance. ▪ Request participants to fill out the skills assessment form (sample forms are provided in the appendices)

One month before (check as completed)	
Check	**Item**
	Prepare participant manuals and materials. Make copies of the: ▪ adapted modules or units ▪ agenda ▪ review each set of materials to make sure everything is ready and correct
	Print other materials: ▪ orientation materials (maps, local transportation information, list of local restaurants, map of the city); provide when participants check in at hotel ▪ CD with documentation, software or additional reading ▪ tents, nametags, participant list for registration (use large print; have participants check their contact information when they register) ▪ certificates with appropriate logos for end of course ▪ skills assessment and evaluation forms ▪ look over the slides and handouts for the course and adjust them as needed
	If you are bringing in computers for the training, develop: ▪ a checklist of what needs to be on every machine ▪ a test so that each machine can be verified before the training begins. You may also need to test the network if the computers are set up this way.

Three days before (check as completed)	
Check	**Item**
	Are accommodation arrangements for facilitators and participants correct?
	Is transport arranged if this is provided?
	Is the training space big enough? Warm/cool enough? Well lit?
	Are there appropriate breakout rooms or other facilities needed for the training?
	Are training supplies (flipcharts, markers, spare paper, handout, forms etc) on hand?
	Are training packets ready with manuals, paper, pen, bags, etc.
	ii) Check all equipment beforehand (check earlier if you will need to get spare bulbs and such from far away) ▪ A/V equipment ▪ LCD laptop or overhead projector ▪ Printer ▪ Flipchart and pens ▪ Backup LCD or overhead ▪ Adapters, converters, spare bulbs if you have a backup projector ▪ Posters

Last minute: day before **(check as completed)**	
Check	**Item**
	Test electronics to make sure everything works
	<u>Facilitator and Support Staff meet to discuss key questions</u> ▪ Discuss who speaks first and when (this is very important in some cultures) and other protocol matters if you have visiting facilitators ▪ Review the agenda and make last minute adjustments ▪ If needed for your course, pre-select small group members to have diverse countries/regions/expertise within each group ▪ Review each person's (facilitators, support staff) roles and responsibilities for the training <u>Review and prepare the final contact list</u>. Include: ▪ Participants ▪ Facilitators, support staff ▪ Other local contacts as appropriate: country GAP field officer, WHO contacts, National Ministry of Health contacts. ▪ Print a large font version of the contact list so that each person can verify their name and contact information at registration.
	Review your chosen evaluation approach. A typical approach is: ▪ skills assessment at registration (you may have sent this out in advance with the invitation letter; think about what you will do if most people don't send it back) ▪ end of day feedback ▪ end of course evaluation ▪ 3 to 6 month follow up evaluation or site visit/observation. Sample evaluation forms are provided in Appendix B.

Unit 2: Sample Course Schedules

Registration

Set up a registration table, one table for every 15 participants. Ask each participant to:

- verify their name and contact information
- collect their name tag and tent
- collect the materials (manuals, handouts) you choose to distribute; you may want to hand out bags with manuals, clean paper or notebooks, pen, course CD and other materials)
- Fill out a skills assessment if participant did not do this in advance (a sample skills assessment is provided as Appendix B)

Sample course schedules

Sample course schedules start next page. Copy and paste any that fit your situation then update to fit your plans. The three sample agendas give an idea of how to organise class time when you present:

- Introduction to HIV/AIDS and STI Surveillance (one week)
- TeachbackTraining of Trainers course (one week)
- Behavioural Surveillance and RDS with Protocol Development (7 days)

Naturally, the time allowed for various topics or modules will change as you adapt for your setting. It is very difficult to accurately assess how long a course will take until you deliver it in front of a “live audience”. Of course you can practice presenting and your subject matter expert facilitators will have an idea of how long to allow for each topic and questions.

Try not to cover too much! This is the key to successful training that accomplishes your goals:

- **Focus your message on what is needed the most.**
- **Limit the number of slides and amount of lecture.**
- **Have the participants work on some real projects that they will use back on the job.**

End of day evaluation

Especially if the course is new (a pilot), allow about 30 minutes with the participants at the end of each day for collecting comments. Try any of these methods:

- conduct a focus group
  - divide the class into four groups and have one group at the end of each day or
  - divide the class into groups of about 6 participants each and have one facilitator talk to each group each day (facilitator that taught that day should not take a focus group; participants may be reluctant to criticise or offer suggestions).

- use a written feedback sheet

A sample daily evaluation form is provided in Appendix B.

End of day facilitator meeting

After the participants have left for the day, have a facilitator meeting to discuss the end of day comments. Decide as a group what you can do to improve the training the next day. This will be a case-by-case decision. Here are some examples of adjustments that were made in previous classes. The participants requested and adjustments were made:

- start the class start earlier
- spend more time on a topic of special interest
- facilitators please speak more slowly
- work through tea breaks (run out, get tea, come back to work) to enable finishing on time at end of day
- move the tables into a U-shape instead of classroom shape
- make group work feedback more structured and focused.

Other suggestions for preparations before the course or course followup, course length and venue will have to be accommodated at the next training opportunity.

Sample Course Schedules

Sample course schedules (agendas) begin next page. Adjust these to fit the content being covered. To get a realistic idea of how long to allow for each topic, have your facilitators review the schedule and materials they want to cover.

Sample 1: Introductory Surveillance Course

Monday, Day 1

Time	Description	Facilitator
8:00 – 8:30	Registration	
8:30 – 9:00	Welcoming remarks and introduction of facilitators and participants	
9:00 – 9:30	Course/module theme, objectives, purpose, ground rules, outcomes, course evaluation plan	
9:30 – 10:00	Module 1, Overview of the HIV/AIDS Epidemic Lecture and Discussion	
10:00 – 10:15	Tea/Coffee Break	
10:15 – 12:00	Module 1 Lecture and Discussion	
12:00 – 1:00	Lunch	
1:00 – 3:00	Module 1 Small Group and Discussion	
3:00 – 3:15	Tea/Coffee Break	
3:15 - 5:00	Module 1 Case Study and Discussion	
5:00 – 5:15	End of Day Evaluation, Focus Group	

Notes:

- Typically, the training facilitators meet end of day to address issues that come up during the training, make schedule adjustments, modify topics or content coverage.
- Don't be afraid to adjust the schedule and hand out a new version on Day 2.

Tuesday, Day 2

Time	Description	Facilitator
8:30 – 9:00	Review, Questions and Answers on Day One	
9:00 – 10:00	Module 2, HIV Case Surveillance: Clinical Staging and Case Reporting Lecture and Discussion	
10:00 – 10:15	Tea/coffee break	
10:15 – 12:00	Module 2 Lecture and Discussion	
12:00 – 1:00	Lunch	
1:00 – 3:00	Module 2 Small Group and Discussion	
3:00 – 3:15	Tea/Coffee Break	
3:15 - 5:00	Module 2 Case Study and Discussion	
5:00 – 5:15	End of Day Evaluation, Focus Group	

Wednesday, Day 3

Time	Description	Facilitator
8:30 – 9:00	Review, Questions and Answers on Day Two	
9:00 – 10:00	Module 3, HIV Sero-Surveillance Lecture and Discussion	
10:00 – 10:15	Tea/coffee break	
10:15 – 12:00	Module 3 Lecture and Discussion	
12:00 – 1:00	Lunch	
1:00 – 3:00	Module 3 Small Group and Discussion	
3:00 – 3:15	Tea/Coffee Break	
3:15 - 5:00	Module 3 Lecture and Discussion	
5:00 – 5:15	End of Day Evaluation, Focus Group	

Notes:

- Continue to adjust the course as necessary to meet the needs of the participants.
- If you finish early, give the participants the choice of continuing and possibly finishing the course early or ending early for the day.

Thursday, Day 4

Time	Description	Facilitator
8:30 – 9:00	Recap, Questions and Answers on Day Three	
9:00 – 10:00	Module 3 Lecture and Discussion	
10:00 – 10:15	Tea/coffee break	
10:15 – 12:00	Module 3 Lecture and Discussion	
12:00 – 1:00	Lunch	
1:00 – 3:00	Module 4, Sexually Transmitted Infection Surveillance Lecture and Discussion	
3:00 – 3:15	Tea/coffee break	
3:15 - 5:00	Module 4 Lecture and Discussion	
5:00 – 5:15	End of Day Evaluation, Focus Group	

Friday, Day 5

Time	Description	Facilitator
8:30 – 9:00	Recap, Questions and Answers on Day Four	
9:00 – 10:00	Module 4 Lecture and Discussion	
10:00 – 10:15	Tea/coffee break	
10:15 – 12:00	Module 4 Lecture and Discussion	
12:00 – 12:45	Wrap Up, Final Questions and Review	
12:45 - 1:30	Closing and Final Evaluation	

Notes:

- Typically, the training ends about midday on Friday to allow participants to travel back to their location. This may not be necessary in your case.
- Facilitators should meet after the course to discuss course changes needed and next steps.

Notes

Sample 2: Surveillance Training of Trainers Schedule

Teachback methodology

CDC facilitators present a training of trainers (TOT) course employing the Teachback methodology. Participants practice:

- preparing materials
- lecturing and conducting group discussions
- running small groups
- responding to participant questions
- receiving feedback on their performance and giving feedback to other participants.

For every 12 participants, you will need a one technical expert (facilitator) and one training specialist (so for 24, you need two technical expert and two training specialists). In one week, you can conduct a 3-day Surveillance course. The Teachback methodology itself requires an additional two days so 3 days of content + 2 days of Teachback = 5 day TOT event.

Typical Teachback schedule

A typical TOT course schedule with 24 participants is provided next page. Note that a pre-registration is usually held the evening before the course begins. This allows the first day, which is very full, to stay on schedule.

Sunday, pre-registration

Time	Description	Facilitator
4:00 – 6:00PM	Register, distribute materials and agenda, give initial assignments. Ice breaker and refreshments.	All

You will need a large room where all participants fit then an additional breakout room for each group of 12 (Group 1 can stay in the big room). For 24, you would:

- divide the class into two groups, 12 participants each (so big room and breakout room are needed); there should be a subject matter expert and training specialist in each room.
- in each group of 12, divide the group into four teams of three

If you have never participated in a Teachback event, it is ***strongly recommended*** that you request assistance because there is extensive planning. Furthermore the schedule is tight so there is very little time to "figure out what to do" once the Teachback begins.

Notes

Monday, Day 1

Time	Description	Facilitator
8:00 – 8:20	Welcoming remarks Introduction of Facilitators and Participants	
8:20 – 9:00	Teachback Workshop Overview, Agenda, Objectives, Materials, Ground Rules, Parking Lot and Housekeeping	
9:00 – 10:00	Teachback Methodology video	
10:00 – 10:15	Tea/coffee break	
10:15 – 11:40	Training Basics	
11: 40 – 12:40	Lunch	
12:40 – 1:00	How to Facilitate a Lecture	
1:00 – 2:10	Lecture Demonstration, Feedback	
2:10 – 2:30	How to Facilitate a Group Exercise	
2:30 – 3:40	Group Exercise Demonstration, Feedback	
3:45 – 4:00	Tea/coffee break	
4:00 – 4:25	Teachback Team Assignments	
4: 25 – 5:00	Team Meeting with Facilitator, Planning	
5:00 – 5:15	End of Day Evaluation, Focus Group	

Notes:

- Facilitators and training specialists meet end of day to discuss adjustments.

Tuesday, Day 2

Time	Description	Facilitator
8:00 – 10:00	Team Preparation	All
10:00 – 10:20	Tea/coffee break	
10:20 – 11:50	Team 1 Unit 1 Presentation and Group Session	
11:50 – 12:00	Team 1 Unit 1 Feedback	
12:00 – 1:00	Lunch	
1:00 – 2:30	Team 1 Unit 2 Presentation and Group Session	
2:30 – 2:40	Team 1 Unit 2 Feedback	
2:40 – 3:00	Tea/coffee break	
3:00 – 4:30	Team 1 Unit 3 Presentation and Group Session	
4:30 – 4:40	Team 1 Unit 3 Feedback	
4:40 – 5:00	End of Day Evaluation, Focus Group	

Notes:

- Each team = two or three participants; each room has four teams.
- Each participant will deliver a presentation and conduct group sessions using assigned material then receive feedback (peer review).

Wednesday, Day 3

Time	Description	Facilitator
8:00 – 9:30	Team 2 Unit 4 Presentation and Group Session	
9:30 – 9:40	Team 2 Unit 4 Feedback	
9:40 - 10:40	Team 2 Unit 5 Presentation	
10:40 – 11:00	Tea/coffee break	
11:00 – 11:30	Team 2 Unit 5 Group Session	
11:30 – 11:40	Team 2 Unit 5 Feedback	
11:40 – 12:40	Lunch	
12:40 – 2:10	Team 2 Unit 6 Presentation and Group Session	
2:10 – 2:20	Team 2 Unit 6 Feedback	
2:20 – 3:20	Team 3 Unit 7 Presentation	
3:20 – 3:35	Tea/coffee break	
3:35 – 4:05	Team 3 Unit 7 Group Session	
4:05 – 4:15	Team 3 Unit 7 Feedback	
4:15 – 5:45	Team 3 Unit 8 Presentation and Group Session	
5:45 – 5:55	Team 3 Unit 8 Feedback	
5:55 – 6:10	End of Day Evaluation, Focus Group	

Thursday, Day 4

Time	Description	Facilitator
8:00 – 9:30	Team 3 Unit 9 Presentation and Group Session	
9:30 – 9:40	Team 3 Unit 9 Feedback	
9:40 - 10:40	Team 4 Unit 10 Presentation	
10:40 – 11:00	Tea/coffee break	
11:00 – 11:30	Team 4 Unit 10 Group Session	
11:30 – 11:40	Team 4 Unit 10 Feedback	
11:40 – 12:40	Lunch	
12:40 – 2:10	Team 4 Unit 11 Presentation and Group Session	
2:10 – 2:20	Team 4 Unit 11 Feedback	
2:20 – 3:20	Team 4 Unit 12 Presentation	
3:20 – 3:35	Tea/coffee break	
3:35 – 4:05	Team 4 Unit 12 Group Session	
4:05 – 4:15	Team 4 Unit 12 Feedback	
4:15 – 5:45	Team 3 Unit 8 Presentation and Group Session	
5:45 – 5:55	Team 3 Unit 8 Feedback	
5:55 – 6:10	End of Day Evaluation, Focus Group	

Friday, Day 5

Time	Description	Facilitator
8:30 – 9:00	Recap, Questions and Answers on Materials or Teachback	
9:00 – 10:00	Expert Lecture or Presentation	
10:00 – 10:15	Tea/coffee break	
10:15 – 12:00	Expert Lectures or Presentations	
12:00 – 1:00	Wrap Up, Final Questions and Next Steps	
1:00 - 1:30	Closing and Final Evaluation	

Notes

Sample 3: Introduction to Respondent Driven Sampling

Monday, Day 1

Time	Description	Facilitator
8:00 - 8:30	Registration, participant skill assessment	
8:30 - 9:00	- Welcome and charge - Introductions, agenda, objectives, materials - Training evaluation methodology	
9:00 – 10:00	Introduction to Behavioral Surveillance	
10:00 -11:00	Measures and Indicators for Behavioral Surveillance	
11:00 – 11:15	Tea/coffee break	
11:15 – 12:15	Survey Methods	
12:15 – 1:15	Lunch	
1:15 – 2:15	Sampling Approaches	
2:15 – 3:15	Discussion: Country/region behavioral surveillance plans and local context (select 1-2 participants from each country or region to take notes)*	Participants and facilitators
3:15 – 3:30	Tea/coffee break	Participants and facilitators
4:30 – 4:45	Complete discussions on country BSS plans	Participants and facilitators
4:45 – 5:00	End of the day evaluation	

*For local context discussion, develop questions in advance. Here are some examples:
- What are the objectives of BSS in your country?
- What are the populations to be surveyed?
- What do you know about the HIV situation, geographic area, and population in your proposed survey?
- How will BSS improve the HIV situation in your population?
- What is the inclusion criteria or case definition for populations to be surveyed?

Tuesday, Day 2

Time	Description	Facilitator
8:30 – 8:45	Summary and discussion of Day 1	
8:45 – 9:45	Sample size calculations and population size estimation	
9:45 – 10:30	Large group exercise: Calculate sample size for surveyed populations (choose participants to take notes)	Participants and facilitators
10:30 - 10:45	Tea/coffee break	
10:45 – 11:15	Ethical Considerations	
11:15 – 12:15	Pre-surveillance Activities	
12:15 - 1:15	Lunch	
1:15 – 2:30	Introduce Generic RDS Protocol Design*	
2:30 – 3:15	Begin RDS Protocol Development: Break into two teams to discuss BSS survey goals and objectives (Chosen participants take notes)	Facilitators and participants
3:15 – 3:30	Tea/coffee break	
3:30 - 4:30	Continue Protocol development: Discuss background, population to be surveyed, inclusion criteria (Chosen participants take notes)	Facilitators and participants
4:30 - 5:00	Whole group discussion	Facilitators and participants
5:00 - 5:15	End of the day evaluation	

Notes:
*This course includes RDS protocol development. For introduction of generic RDS protocol design, include background and study objectives, methods and procedures, coupons, incentives, sample size calculations, questionnaires, biological testing, reaching sample size, ethical issues/consent forms, questionnaire development, data storage and timeline.

Wednesday, Day 3

Time	Description	Facilitator
8:30 - 8:45	Summary and discussion of Day 2	
8:45 - 9:30	Overview of RDS design	
9:30 - 10:30	Preparing to conduct an RDS study	
10:30 - 10:45	Tea/coffee break	
10:45 - 11:30	Identifying and recruiting seeds	
11:30 - 12:00	Selecting interview sites	
12:00 - 1:00	Lunch	
1:00 – 1:45	Designing coupons and setting incentives	
1:45 – 3:00	Group exercise: • split into teams and design country coupon • present back to larger group	
3:00 - 3:15	Tea/coffee break	
3:15 – 4:15	Discussion: Split into teams and discuss survey implementation issues for RDS issues discussed to date: preparation, identification and recruiting of seeds, interview sites, incentives, coupon design, potential problems Assigned participants take notes	
4:15 – 5:00	Present survey plans back to larger group	
5:00 - 5:15	End of the day evaluation	

Thursday, Day 4

Time	Description	Facilitator
8:30 - 8:45	Summary and discussion of Day 3	
8:45 - 9:45	RDS questionnaire development	
9:30 - 10:00	Peer Driven Interventions (PDI) in RDS Group exercise and discussion	
10:00 - 10:15	Tea/coffee break	
10:15 - 11:00	Staff study consideration	
11:00 - 11:45	RDS study documentation and management	
11:45 - 12:45	Lunch	
12:45 - 1:30	Controlling sample growth and ending RDS recruitment	
1:30 - 2:00	Data storage, tracking, and management	
2:00 - 2:30	RDS analysis	
2:30 - 2:45	Tea/coffee break	
2:45 - 5:00	Discussion: Split into two teams and discuss questionnaires, peer driven intervention, RDS documentation and management, ending RDS recruitment, data storage, tracking, and analysis for local context and potential problems (Chosen participants take notes)	
5:00 - 5:15	End of the day evaluation	

Friday, Day 5

Time	Description	Facilitator
8:30 - 8:45	Summary and discussion of Day 5	
8:45 - 10:30	Team protocol development • Team review notes and discussion points from Days 1-4 • Team to continue to work on develop protocol and discuss site-specific issues on sections that have not been addressed: o Background and study objectives o Methodology, survey design, methods and procedures o Coupons o Incentives o Sample size calculations, population size estimation o Questionnaires o Biological testing o Ending RDS and reaching sample size o Ethical considerations, consent form o Data storage, tracking, and analysis o Timeline	
10:30 - 10:45	Tea/coffee break	
10:45 - 12:00	Continue team discussions on protocol	
12:00 - 1:00	Lunch	
1:00 – 3:00	Assign team sub-groups to work on incorporating site-specific text into protocol • Group #1: work on section 1 • Group #2: work on sections 2,7,8 • Group #3: work on section 3,4 • Group #4 work on section 5,6 • Group #5 work on section 9	
3:00 – 3:15	Tea/coffee break	
3:15 – 4:30	Each team present protocol back to larger group with discussion	

4:30 - 5:10	Group discussions, timeline, next steps	
5:10 – 5:30	Course evaluation	
5:30	Presentation of training certificates and take group photograph	

On Days 6-7, pre-selected participants will stay to complete the survey protocol. They will be assisted by several facilitators.

Unit 3: Adult Learner Characteristics and Styles

Adult Learning Principles

Teaching adults is unique. Adults have different learning needs and preferences than children or adolescents. Part of being an effective facilitator involves understanding how adults learn best then applying this understanding when you facilitate training.

Unlike children and teenagers, adults have life responsibilities that they must balance against the demands of learning. These are *barriers to participation in learning*. Some of the barriers include:

- lack of time, scheduling problems or don't know about opportunities to learn
- lack of money
- lack of confidence or interest
- "red tape" or other difficulties such as problems with childcare and transportation.

The table next page lists some characteristics of adult learners and gives Surveillance training examples. Think about your country when you read the techniques and ideas.

- In your experience, would they fit your country?
- Use any technique that works in your country. Don't limit yourself to the list.

For your country/culture, what characteristics would you add about your adult participants?

Notes

Table 3.1. Consider the characteristics of adult learners when you work in the surveillance training setting

<table>
<tr><td colspan="2">Adult Learner Characteristic: Adults prefer training that focuses on real life problems and applications.
▪ Most adults attend a course with the expectation that they will gain some new knowledge or skills that they can apply once they complete the training.
▪ They either openly or privately ask themselves, “How will this course help me?” If they feel that their time is being wasted, they become bored or distracted.
▪ Adult learners tend to be less interested in survey courses. They tend to prefer single concept, single-theory courses that focus on the application of the concept to “real world” problems. This tendency increases with age.
▪ A natural learning environment engages learners in solving authentic, non-routine problems likely to be encountered back on the job. Problem solving is collaborative. Participants contribute to the dialogue and construct novel solutions. Facilitators encourage participants to engage in critical reflection, questioning the values and assumptions behind answers suggested by other learners.
▪ Participants acquire knowledge and skills by framing problems in terms of conditions likely to be encountered on the job.</td></tr>
<tr><td>Do this…</td><td>Avoid this…</td></tr>
<tr><td>1. Ensure that the training meets the needs of participants by analysing their previous training, skills, interests and job responsibilities before or at the beginning of the training.

2. Once you learn about participants’ expectations, adapt your training to meet their needs and preferences. If needed, alter the planned agenda to meet local needs.

3. Focus your training on the “HOW TO” rather than on the “WHAT”, such as:
▪ How to fill out certain forms that will be used back on the job
▪ How to start a new program, such as HIV case surveillance

4. Throughout training, use examples that apply to the participants’ jobs. Ask them how they can adapt or use the knowledge/skills gained in the course in their work setting.</td><td>1. Sticking to the agenda no matter what, even if it “doesn’t fit.”

2. Training that is too didactic, too “university” with too much lecture, too many slides. Participants come out of the training <u>not knowing what to do</u> back on the job. Examples of what <u>not</u> to do:
▪ Show a new surveillance form and lecture about it without giving participants a chance to practice using it and getting feedback.
▪ Talk about what to do to start a new program without giving participants a chance to discuss the situation and what to do in their country.</td></tr>
</table>

<table>
<tr><td colspan="2">Adult Learner Characteristic: Adults need to be able to integrate new ideas with what they already know to retain and apply the new information.
▪ Adults bring a great deal of life experience into the classroom. This experience is an asset that should be acknowledged, tapped into and used throughout a training course.
▪ Using participants’ experience and knowledge is a key component to effective training with adults.</td></tr>
<tr><td>Do this…</td><td>Avoid this…</td></tr>
<tr><td>1. Use participants’ existing experience as a foundation. Build new knowledge and skills on this.
2. Arrange the training agenda from areas that are known to unknown. Give time for discussion of <u>what currently exists</u> in participants’ country/region.
3. Provide opportunities for participants to share their knowledge and experience with each other. Adults learn well from dialogue with respected peers.
4. Learn as much as possible about your participants before the training or at the beginning of the training.
5. Plan follow up activities to promote application back on the job.

Examples:

▪ When you have a mixed participants (experienced and inexperienced audience: typical of adult education!), ask the experienced surveillance officers to provide their insight.
▪ Use local experts to lead panel discussions or Question and Answer sessions.
▪ Learn more about participants by asking:
o about their previous experience and training in the topic you are teaching
o what they hope to gain from the training
o how they will use the training back on the job.
▪ Use a pre-training skills assessment or an “icebreaker” at the beginning of the training course to learn more about participants.</td><td>1. Delivering the same lecture over and over without acknowledging the participants’ needs, skills, knowledge and experience.

2. Teaching a new skill without tying it to what is already known/done in the learners’ environment.

3. Rushing through a large amount of content with no discussion. It is far better to <u>cut the amount of content</u> Instead, include practice and discussion.</td></tr>
</table>

<table>
<tr><td colspan="2">Adult Learner Characteristic: Effective training for adults uses interactive, participatory teaching techniques.
▪ Adults tend to dislike long lectures and one-way communication and learn best from activities that allow them to practice applying new knowledge and skills.
▪ Interactive and participatory training helps to:
  ▪ maintain the interest of participants throughout a course
  ▪ increase their retention, recall and application of new information.</td></tr>
<tr><td>Do this…</td><td>Avoid this…</td></tr>
<tr><td>1. Practice the things you want participants <u>to be able to do</u> back on the job.
2. Simulate the environment that the learner will encounter.

Examples: If the training is about how to collect data during an upcoming surveillance activity:

▪ provide sample information and have the participants practice filling out forms or entering the data in a database, whatever is most like the “real” situation
▪ provide time for review of and feedback on the forms
▪ allow time for discussion in groups or full class setting.

▪ Focus on “real” projects that participant can really use and take back to work. Examples:
  o Develop country operations manuals in class
  o Develop a country protocol (for regional trainings, break up into country groups)
  o Conduct action planning for how participants will “roll out” new training or a new protocol in their country.</td><td>▪ Lecture and slides
▪ An enormous amount of content to “cover”

Lecture and slides are the <u>quickest way</u> to deliver a great deal of content. But if participants can not remember the content or apply it, there is little point in “delivering” it.</td></tr>
</table>

Notes

Adult Learning Styles

Adult learners have different *learning styles*. People learn best in different ways. Many of these differences are cultural. One way you can ensure that participants with different learning styles will all learn the information and skills you are teaching is to use a multi-media or multi-communication style. The three learning styles are described below with recommendations for working effectively with each type of participant.

Table 3.2. How to address learning styles.

Learning style	How to address
iii) Auditory learners: "I hear" ▪ Auditory learners learn best through hearing. ▪ They prefer using their ears and voices as their primary way to take in and process information.	To best help auditory learners, say important concepts out loud or let the participants say them out loud as they learn them.
iv) Visual learners: "I see" ▪ Visual learners learn best through seeing. ▪ They prefer using their eyes as their primary way of taking in and processing information.	To meet the learning needs of visual learners, illustrate important concepts using visual aides (i.e, graph, chart, diagram, table) and through reading.
v) Kinesthetic learners: "I do" Kinesthetic learners learn best through touch and movement and use their hands as their primary way of taking in and processing information.	To meet the needs of kinesthetic learners, ensure that important concepts are incorporated in a learning activity that involves movement and hands-on practice (i.e. writing information, drawing diagrams, role playing.)

Use a multimedia or a multi-communication style: mix it up. Avoid straight lecture.

How to Present Training Information

Types of learning

There are three types of learning: knowledge, skills and attitudes. It is important to think about what type of information you are presenting so you can design your training and activities to match the type of learning you want your participants to achieve.

Table 3.3 Types of learning.

Variety of learning defined	Examples	How to deliver and test
Knowledge: facts, information or content. Most training consists of teaching participants information.	▪ the history of the computer ▪ how the computer can be used ▪ the benefits of one computer program versus another	▪ lecture ▪ slides Test: tests and quizzes to determine knowledge of facts
Skills: some type of movement or how to perform an action or series of steps.	▪ keying in information on a computer ▪ drawing blood from a patient	▪ observation ▪ practice ▪ feedback Test: observe participant performing new skill. Score on accurary and speed.
Attitudes; how people feel about something.	▪ how participant feels about providing contraceptive services to adolescents	▪ discussion of beliefs ▪ investigation Test (long term): compare attitudes before and after

One very common mistake made during training delivery is using training activities or tests that do not match the type of learning desired. For example, facilitators may organise a course with the intention of teaching healthcare workers:

- to determine if an ANC client fits in the study then
- to use a new form and gaining their “buy-in” so the workers will take the time to fill it out properly and carefully.

What if the training developers:
- use training techniques that help increase participants’ knowledge (lectures and discussions) but
- do not include practice for interviewing ANC clients or how to fill in the form?

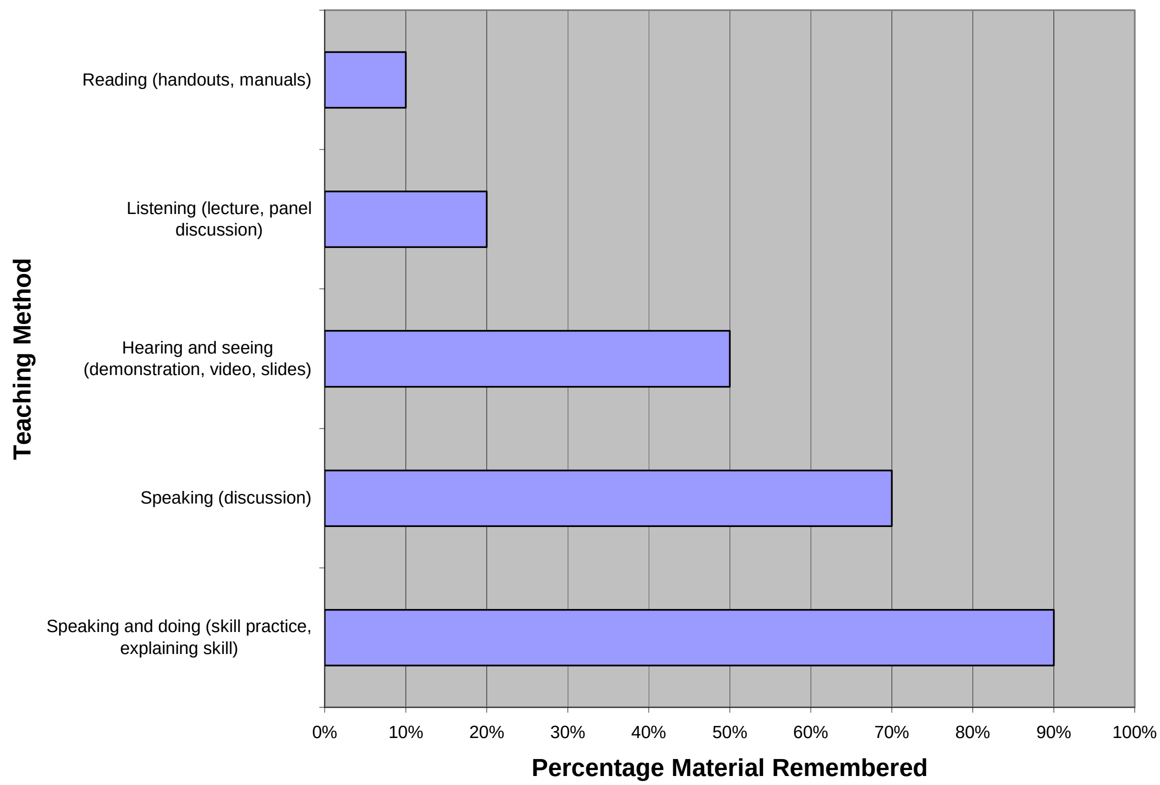
Participants are very unlikely to develop the new skills because there was no practice.

Determine what you want participants to know, do or feel after the training. Use the right delivery style to achieve that.

How Your Presentation Affects Participants' Memory

Figure 5.1 below shows how the way course information is presented affects what participants will remember right after a training course. If the new information is not used, these percentages start to drop right away.

Figure 3.1. Relationship of teaching method to what adults remember.



Try to provide training right before the knowledge, skills and attitudes will be needed on the job.

Unit 4: Adult Learner Communications

Effective Facilitator

A *facilitator* is a person who helps participants learn the skills presented in the course materials, usually through mentoring a participant, individually or conducting small groups or whole group sessions. To be an effective facilitator, you need to be very familiar with the subject matter and content of the training modules. Your role may be any combination of the elements listed below:

- Introduce the key concepts of each module and explain ideas
- Lead group discussions
- Answer questions or better yet try to help the group find answers. Find the answer if you do not know it.
- Give feedback to participants when appropriate
- Discuss how participants can apply information in the modules to work in their own countries, regions/provinces or districts.

Before leading a training event, be sure that you understand all the content that will be covered. Develop examples of how surveillance information presented in the course can be applied.

The sections that follow offer practical tools and techniques for presenting to adult learners (adapted from Ron Hoff, "I Can See You Naked").

Engage participants in training

Actively engage participants in learning from the beginning of a course to maintain their interest and participation.

At the beginning of the course, express enthusiasm. Always let participants know that you are delighted to be there. For example:

- "I've been looking forward to this…", "I'm delighted to be here with you."
- Or express it indirectly by projecting energy and enthusiasm.

Clarify your expectations

Address expectations before presenting content. What will participants be learning? Explain the ways this will help them attain their goals as learners.

Share your knowledge generously

Open up. Share what you know. If you don't know something, it is fine to tell a participant that you don't know the answer, but you will find out and get back to them. Better yet, have the participants themselves find and share the answer when this is possible.

Foster open exchange of ideas

- Protect minority opinion
- Keep disagreements civil and unheated
- Make connections between various opinions and ideas
- Keep reminding the group of the variety of potential solutions to the problem.

Help participants build rapport

At the beginning of the course, use an "ice breaker" exercise to help participants get to know each other. Here are some suggestions:

- Divide the group into pairs that don't know each other.
  - Provide participants with a short list of topics to discuss such as their interests, favourite part of their job, etc.
  - Then have each person introduce their partner to the larger group based on the content of their conversation.

- Ask the whole group to mingle and interview at least three people using one or two questions you have provided. Ask for people to volunteer to report back to the large group what they learned from their interviews.

- Develop a list of questions about participant experiences.
  - Sample questions: places they may have visited, important events or sports events they may have attended, hobbies, favorite foods and so forth.
  - Have the group mingle to find one person for each experience.

Repeat, repeat, repeat

Whether information is new or a review, repeat key concepts again and again to help participants remember them. Use a different explanation and example each time.

- First tell participants what you are going to tell them. This establishes an expectation of what is coming next and allows the participant to get into the proper frame of mind. One way to do this is to remind the participants of the learning objectives for the lesson. For example,

  > "Today's lecture is about the approaches for conducting a study with high risk populations. When we are finished, I expect you to be able to recall three key approaches I will talk about and why they are important for obtaining accurate surveillance data."

- Tell them. This is the major content of the presentation. Plant "flags" which summarise important points throughout the body of the lecture. A "flag" tells participants exactly what you want them to take away from the course. It is deliberately interruptive. For example:

  - "Let me make a point here…."
  - "Let me summarise this point for you…."
  - "Here is the first approach I want you to remember…."

  Flags notify participants that what is being said is important and when they should be taking notes.

- Tell them what you told them. Although the lowest point for a participant's attention in a lecture is between 20 to 40 minutes into the lecture, attention picks up again at the end of the lecture. This is a good time to summarise the important concepts or information covered in the lecture.

Listen

Good facilitators not only share information, they also listen to participants. By listening, you know if participants understand new material and whether the information is important to them. Active listening is used to gain information about how participants feel about the training as well as showing them that you value their perspectives and ideas. An effective listener will:

- Allow time for others to speak. Give participants and co-trainers time and space to express their perspectives and concerns. Do not complete other people's sentences.

- Listen carefully and thoughtfully. Take the time to consider the perspectives of participants and co-trainers even when they express perspectives that are challenging. Respond after others have finished speaking. Do not interrupt.

- Be respectful and inclusive. Add to the ideas expressed by others rather than dismissing them.

Encourage Participation and Application

As discussed previously, training that is participatory and interactive is likely to maintain participants' attention as well as to help ensure recall and retention of new information.

- Use different training techniques to increase participation. For example:
    - Call upon participants during presentations
    - Maintain interest and enhance learning by using large and small group discussion sessions, participant presentations, group brainstorming and short, simple games.

- Throughout the training, ask participants to provide examples and apply what has been presented.
    - This gives you as a facilitator an opportunity to determine if what you are saying is being understood.
    - Use structured activities to allow participants to practice applying new skills and knowledge, that is, applying new knowledge using a case study or practising using a new formula or algorithm.

- Add to the curriculum with your own personal knowledge. Keep making connections based on your own experiences and share them with the class. Encourage participants to do the same.

Use Questions Effectively

Questions are an important part of training. They will help you see how well the participants are learning new information and skills. Questions may alert you to participants' concerns. Used effectively, questions also help to facilitate participation.

- Use questions to create opportunities to involve participants. After reviewing the objectives of your lecture with participants, consider asking them a question that pertains to the topic. Some other techniques for using questions during training include:
  - frequent question and answer sessions with lectures
  - invite participants to share their knowledge with each other (rather than you answering every question posed by participants).

- Avoid embarrassing participants by "putting them on the spot" with difficult questions that they can't answer. Ask for volunteers to answer questions and participate in training events.
  - Don't put participants "on the spot" by calling on specific individuals.
  - If you pose a question that no one volunteers to answer, simply rephrase the question and wait.
  - Give a hint at the answer.
  - If after that no one responds, then answer it yourself.

- Repeat questions and comments from participants to make sure that everyone in the room has heard them.
  - Invite others to respond to questions and comments, especially if there are questions about the practical application of new information or skills.
  - If there are a number of questions or comments, try to group them according to topic.
  - Again, draw on the group's collective experiences. Vary your questions by asking both simple and complex questions.

- Use different types of questions to elicit different kinds of information and participation. Effective facilitators carefully use different kinds of questions to gather information from participants and support active participation in discussions and activities. Table 5.3 next page lists the different types of questions.

Table 4.1. Types of questions.

Question type	Answer description	Example
Closed-ended question	▪ You will get a short answer such as “yes” or “no” or just a few words. ▪ This type of question does not generate discussion and limits what the participant says.	Are you having a difficult time with this exercise?
Open-ended question	▪ You may get a descriptive answer. ▪ This type of question generates discussion and opens up communication.	Would you please describe how you are doing with this exercise?
Probing question	▪ You will get ideas or opinions about a subject. ▪ This type of question can help you find the root of a problem or confusion.	o Would you tell me more about that? o Why do you think that is the case?

Create a Positive Learning Environment

Learning to apply new skills and knowledge often involves taking risks and making mistakes. This can be very uncomfortable for adult learners. Adults learn best in environments that are:

- positive and supportive
- encourage problem-solving and experimentation.

Create an environment where participants feel supported as they:

- practice applying new skills and knowledge and
- receive prompt and constructive feedback.

Try these techniques to foster a supportive learning environment:

- Demonstrate respect for participants' perspectives, experience and expertise.
  - Provide opportunities for participants' to share their experiences and expertise with you and with each other.
  - Offer sincere praise to participants one-on-one and in front of others.

- Provide participants with prompt, constructive feedback on their performance. Provide participants with clear guidance about what is expected of them and offer positive, concrete feedback on their performance. Focus on participants' strengths as well as areas that need improvement. Offer concrete suggestions for ways in which participants can improve.
  - Offer positive feedback and praise before you offer suggestions for improvement.
  - Focus feedback on the participant's performance rather than on the personality or characteristics of the participants themselves.
  - When possible, create opportunities for participants to assess and correct their own performance.

- Treat all participants with respect. Acknowledge everyone's contribution even if you don't agree with what they say.
  - Show respect for differences (cultural, gender, age) and encourage participants to do the same.
  - Avoid making personal comments even when teasing or joking with participants.

- At the beginning of the course, work with participants to develop a set of "Ground Rules" for interaction and communication throughout the course. Examples of ground rules include:
  - show respect for other people's ideas or perspectives
  - speak loudly enough for everyone to hear
  - don't interrupt other people
  - start and end each day on time.

  Here's how to establish the ground rules:
  - Give a few examples of ground rules and then ask the participants to suggest additional rules to the group.
  - List these on a flipchart page.
  - Tape it to the wall.
  - Keep it posted throughout the course, referring to the rules when necessary.

Manage Time Carefully

Managing time is critical to reaching the goals of the training course. Here are some things to try to keep on track:

- Set up a "parking lot". A parking lot is a system for putting aside comments and questions that arise during a training course but which are not directly related to the topic being discussed or which need further discussion. Create a parking lot by:
  - taping a large blank sheet of paper to the wall where participants' comments and questions are written throughout the course.
  - These topics can be covered during the course if time permits or outside of the classroom or during breaks.

- Keep the discussion on track. When a participant's comments start moving the discussion off-topic, gently intervene to bring the discussion back to the topic at hand. To do this, you can either:

  - Wait until a participant finishes his/her comment or
  - gently interrupt by saying "Let me paraphrase what you said to make sure I understand and to see how it connects with the topic we are discussing".
  - Summarise the participant's comments and link them back to the main topic.
  - Refocus the discussion by asking other participants for their comments about the topic at hand.

- Negotiate changes in the course schedule with participants. If you are running out of time to deal with a particular topic, check with participants to see if they are willing to change the course schedule to allow sufficient time to address the topic.

  - Participants may be willing to extend their day, start earlier the next day, shorten lunch breaks or shorten discussion time on certain topics.
  - Often participants will begin to keep track of the time by keeping the discussions more focused.
  - If it becomes clear that there is not enough time to cover the rest of a course, inform the participants. Get either their approval to extend the course to cover all topics or get their permission to eliminate certain topics.

Deal Directly with Difficult Participants

During training course, difficult situations and disruptive interpersonal dynamics may arise. Be prepared to deal directly and diplomatically with these situations to help minimise disruption to the course and help ensure that all participants gain the most benefit from the training. Try these tips:

- Prevent a few participants from dominating the course. Try this strategy:
  - ask the participant to wait to speak until others have had a chance to talk
  - gently interrupt the participant, summarise their comments and solicit reactions/ideas from others in the group.
- Manage disagreements. At times, participants may disagree with each other. Participants may disagree but don't let them attack each other verbally. Try to use a disagreement as a teaching opportunity:
  - interject and highlight the aspects of the disagreement
  - thank the participants who are disagreeing for sharing their ideas
  - ask the other participants to add/react to the perspectives that have been expressed.
- Minimise interruptions. One simple way to address participants who interrupt others is to refuse to make eye contact with them when they speak out of turn. Just maintain your eye contact with the first speaker and encourage them to complete their thoughts.

Deliver Training Effectively

As a facilitator, your job is to deliver training using a presentation style that helps motivate and inspire participants. There are several key facets of presentation style that deserve special attention. These include:

- your preparation and rehearsal prior to delivering a training to ensure you are prepared and relaxed when you stand up to facilitate.
- your eyes, voice, expression and how you stand and move
- your use of visual aids.

Rehearsal

There is no substitute for rehearsal to help you to feel prepared and relaxed. Here are a couple things to keep in mind:

- Most facilitators find that they need about 25% more time to complete their presentations out loud than the time it takes for them to complete them "in their heads."
- Using a flipchart or other visual aids also adds to the length of presentations.

Rehearse before you deliver training helps you plan the length of your presentations and activities. You may identify aspects that are unclear or confusing.

How to rehearse

It is better to finish a presentation or activity slightly early than to run over time. Try these rehearsal tips to get ready:

- <u>Rehearse alone in front of a mirror or in an empty room</u>. If possible, rehearse in the same room where you will be facilitating.

- <u>Rehearse with visual aids</u>. Get familiar with the technology and where you will stand.

- <u>Rehearse in front of a small group</u>. Get one or two friends to give you feedback.

- <u>Accentuate your gestures and vocal projection</u>. Get used to your own sound.

- <u>Time yourself</u>. You can determine the time needed to explain the materials.

Relax

There are many techniques that experienced facilitators use to reduce nervousness or anxiety before and during a presentation or activity. The good news is that the participants never notice your nervousness nearly as much as you think that they might. Try some of these relaxation techniques:

- Breathe. Concentrate on controlling your breathing and taking deep breaths.

- Use your heightened energy to enhance your presentation. Experienced facilitators learn to welcome and use the extra adrenaline they feel when they present and facilitate in front of a group.

- Take a moment to re-group. If you lose your train of thought in the middle of a lecture, smile, look at your notes and take your time. The silence will seem long to you but it will seem less so to the audience.

- Keep water close by in case your mouth gets dry. Additionally, you might want to have a handkerchief to wipe hands or brow.

Voice

The voice is probably the most valuable tool of the presenter. It carries most of the content that the audience takes away. Try these tips to use your voice most effectively:

- Speak so that you can be heard clearly but avoid shouting. Ask the participants if they can hear and understand you.

- Adjust the tone of your voice according to the subjects you are covering. For serious subjects take a more formal tone. At other times you might want to be more humorous. But stay relaxed and calm to put your audience at ease.

- Try to vary your pitch to maintain a participant’s interest. Lower your voice to draw the participants in and raise it to make a point. We often do this naturally when we are talking to someone in a relaxed setting about a topic we are interested in.

- Vary the pace of your speech. This helps maintain participants’ attention.

Facial expression

Participants watch your face. If you are looking listless or distracted then they are prone to become listless and distracted as well. If you are smiling, they will wonder why and listen to find out. As in normal conversation, your meaning is enhanced by facial reinforcement.

- Establish eye contact with each and every participant as often as possible. This is not easy in a large group. The eyes are the first and most effective tools in convincing the audience of your honesty, openness and confidence in the objectives of your presentation.

- Read the eye contact and facial expressions of participants. Assess their level of interest in and understanding of the topics being covered. If you notice that participants are looking bored or look confused, stop and ask them to see if this is the case. For instance, you can say:

  - "It looks like people are getting tired, is that the case?" or
  - "I am not sure if I am making sense to everyone right now. Does anyone have any questions" or
  - "Are there points that are confusing and need to be re-explained?"

- Make sure that your facial expressions are natural, instead of forced.
  - Smile when appropriate. Smiling is a powerful cue that transmits approachability and relaxation.
  - However, smile only when it is appropriate. Constant smiling loses its impact.
  - If you are speaking about a technical topic, a relaxed non-smiling face is appropriate.

Stance

While you are in front of a group, your stance and posture conveys a great deal about you. The least you must do is make sure your stance does not convey boredom; at best, you can use your whole body as a dynamic tool to reinforce your rapport with the audience.

- Always stand up when presenting. Standing up gives you authority – automatically and instantly. It signals to the rest of the group to listen.

- Do not use a podium. It adds a barrier between you and the participants and makes it harder to maintain eye contact.

- Move while you speak. When you move, you help to maintain the interest of participants and reduce your own anxiety or nervousness. Try these ways to put movement in your delivery:

  - point to a slide
  - work out an equation on the black or whiteboard
  - walk around the room while asking and answering questions.

Moving around the room also gives you a chance to strengthen your connection with the participants by closing the space between you and them.

Visual aids

Most people learn better when they have visual reinforcement for any verbal message being delivered. Try some of these tips:

- Design aids with a specific purpose in mind. Here are some effective uses:
  - reinforcing a verbal message to aid in recall and retention of new information
  - explaining information which can be more easily displayed than discussed
  - adding humour and entertaining participants
  - helping to pace presentations.

  Remove visual aids that doesn’t have a specific purpose. Visual aids that are not related to the information in the course can confuse participants instead of helping them learn.

- Design aids so that the words can be read from the back of the room. Visual aids that cannot be easily read or understood by participants can be distracting or confusing. For a group of 20 to 25 participants, make the smallest font 28 point.
  - Try one sample slide in the room in advance if possible.
  - Go to the back of the room to see if you can read the slide.
  - If not, make the font larger in your slides.

- Speak to the participants...NOT to the visual aids. Also, do not stand between the visual aid and the participants.

- Do not read straight from handouts or slides. This confuses the participants since they will not know whether to read along or listen to you read.

Facilitating Effective Group Discussions

Establish ground rules

Depending on the group setting, discuss the ground rules with participants. Examples of group discussion ground rules are:

- One conversation at a time (no sidebar conversations)
- Group conversation focuses on the assigned topic
- Establish roles and responsibilities of different group members (i.e., group leader, notetaker/scribe, speaker who will report back to the larger group after small group discussions).

Focus on group dynamics

Interact with participants from a stance of relaxed attentiveness.

- Make eye contact with members: are they interested, bored, confused?
- Focus on group dynamics.
  - Is anyone talking too much?
  - Are there interruptions?
- Keep in mind the purpose of group work. What is the group trying to achieve by working together? Are they achieving it or do you need to assist?
- If a group is confused, try to discover the reason:
  - Look to the members of the group to share technical information.
  - If this does not occur, provide technical information to the group if you have it.

Involve quiet participants

There are different levels of participation in groups. Here are some ideas for encouraging quiet participants to contribute to group discussions:

- Observe group behaviour to see what the quietness might mean. Do the quiet people look engaged, bored, confused? Have they tried to talk but were interrupted or not listened to?
- Invite anyone to speak who hasn't already spoken.
- Offer a chance for others to comment on someone's comments.
- Break up the large group into pairs or smaller groups to encourage participation.
- Allow for silence and pauses in discussion.
- If someone is dominating the conversation, acknowledge their comments and invite others to add to the conversation.
- Consider asking a person who has talked frequently to wait for a moment and let others respond first.
- Include the ideas of as many of the group members as possible.

Appendix A. Testing Strategy

Testing strategy

Much has been written on testing. Remember that good test scores do not ensure enhanced performance back on the job. Consider more practice of what you want participants to do instead of testing.

Still, you may have a reason to test. If so, probably the most important thing to remember is this: your questions need to reflect the most important parts of the course. Avoid obscure questions!

Decide during your analysis (discuss with your stakeholders, supervisor and other reviewers) if you should test. If so, agree on a testing strategy:

You could test:

- at the beginning and end of the course. This is called “pretest” and “posttest”. Often the same or similar questions are used to see if participants learned the answers in the training. Your questions will be the most important course information or they could be a “performance” test where participant will have to do what was taught.
- You could just test after the training.

We have not provided final test questions in the modules and courses because we expect every training situation and audience to be different, based on local needs. Use the warm up questions or course summaries to help you develop test questions.

Notes

Appendix B. Evaluation

Decide during your analysis (discuss with your stakeholders, supervisor and other reviewers) how you will evaluate the training. End of course evaluation is common but the problem is that you don't learn much. The important thing is: is the training being applied back on the job? If not, why not?

Beginning next page, you will find evaluation forms. Use them as a starting point for your evaluation or develop new forms that fit your plans and environment. We have included a:

- Skills assessment form (to find out participant background at beginning of course
- Daily evaluation questions (can be used in focus group or written)
- End of course evaluation form
- Follow up evaluation form (three to six months after training to determine how well the information is being applied back on the job and to see if participants have additional suggestions for improving the training).

Notes

<Training Activity,
Location, Date>

Skills Assessment (pre-training)

Demographic Information (Please print clearly and be complete)		
1. Full Name		
2. Sex ☐ Male ☐ Female	3. Age _________ years	
4. Education Level (degree, certificate, diploma) **and** field of study		
5. Job Title	6. Time at current job Years______ Months_______	
7. Employer (i.e., MOH, university, WHO, CDC)	8. At which level (if applicable)? ☐ Site/Center Level ☐ District/Regional Level ☐ National/Central Level	
9. Work Address		
10. Telephone	11. Fax	12. E-mail

13. How did you find out that this course was taking place? Check one.

☐ _____ From my supervisor
☐ _____ From a work colleague/co-worker
☐ _____ I received an invitation letter from the sponsoring organization
☐ Other (please describe):
____

14. Who invited you to attend the training?____

15. With what organization is that person affiliated? ___________________________________

16. Besides this course, have you attended any other training(s) in the last six months? Circle one.

☐ Yes ☐ No

If yes, trainings on what?

17. Are you involved in any of the following surveillance activities in your country?			
ACTIVITY	**YES**	**NO**	**IF YES, YOUR ROLE**
ANC Sentinel Surveillance			
STI Surveillance			
HIV Case Reporting			
Behavioral Surveillance			
Demographic Health Survey (DHS/DHS+)			
Other Surveys (Please list):			

18. My current job responsibilities (Please check all that apply)	✓
I design surveys or studies.	
I participate in data collection.	
I review data entry forms to ensure accuracy.	
I perform data entry.	
I manage and/or clean data.	
I analyze data.	
I directly supervise staff performing any of the above data activities.	
I present and/or report data to stakeholders and/or others.	
I conduct surveillance-related trainings.	
I am in charge of program implementation and/or coordination.	
I work in information technology/health management information systems (HMIS).	
I do health education activities.	
I do direct patient care.	
I work with budgeting/financing.	
I conduct monitoring and/or evaluation activities.	
I am responsible for administrative tasks.	
I conduct public health research.	
Other responsibilities:	

19. Computer Usage (Please check all that apply)	✓
I use a computer in my job.	
I share a computer with others at work.	
I use a computer for word processing.	
I use a computer to generate presentations (e.g., use PowerPoint)	
I use a computer to enter data.	
I use a computer to manage and/or clean data.	
I use Epi Info 2002 (Windows version) to manage data.	
I use Epi Info 6 (DOS version) to manage data.	
I use SAS to manage data.	
I use SPSS to manage data.	
I use Microsoft Access to manage data.	
I use Microsoft Excel to manage data.	
I use STATA to manage data.	
I use other data management tools not listed above.	

Please list other data management programs not listed above that you use:

20. Please list three ways to improve current HIV/AIDS surveillance activities or trainings in your country.
1.
2.
3.

21. Please list three things you expect to be covered in this training.

    a.

    b.

    c.

Directions: The following questions refer to the primary area(s) in which you work

22. Does your organization have a protocol and standard operating procedures for the primary activity in which you work?

    ☐ Yes ☐ No (Skip to Q. 7)

    If yes, have you read it/them? ☐ Yes ☐ No

23. If you report surveillance data, do you receive feedback on what you report?

    ☐ Yes ☐ No (Skip to Q. 8)

    If you receive feedback on surveillance data, when was the last time you received feedback on the data you reported?

24. Does your organization produce and/or publish a surveillance report(s) for the primary area in which you work?

    ☐ Yes ☐ No (Skip to Q. 9)

    If yes, where or to whom do you send the report(s)?

25. Does the information derived from the data your organization collects used for any of the following surveillance activities?

ACTIVITY	YES	NO	DO NOT KNOW
Program Planning and Improvement			
Advocacy/Policy			
Monitoring and Evaluation			
Planning for Interventions			
Program Evaluation			
Marketing and Education			
Training			
Other (please describe):			

<Training Activity, Location, Date>

End-of-Day Evaluation, Day ______

Please tell us how to improve this workshop.

1. How well were you able to understand today's presentations?
_____ Very well
_____ Somewhat
_____ Not very much
Please explain:

____
____
____

2. Which topic was most difficult to understand today? What suggestions do you have for improving that topic so you may learn better?

____
____
____
____

3.
Were all your questions adequately answered? ______ Yes ______ No

Did you feel comfortable asking questions? ______ Yes ______ No
Please explain:

4. What were the top three things that went well today and we should continue doing?

____
____
____
____
____

5. What were the top three things that could be improved (things we should have done differently)?

____
____
____
____

<Training Course Title,

Location,
Date>

End of Course Evaluation

Name (optional)**:**

	Question					
		Too easy				**Too difficult**
1.	How easy or difficult was this course?	1	2	3	4	5
		Not at all				**Completely**
2.	To what extent, before coming to the course, were you informed about the *purposes* of the course?	1	2	3	4	5
		Not at all				**Completely**
3.	Was the content of the course *consistent* with the stated objectives?	1	2	3	4	5
		None				**Substantial**
4.	To what extent do you expect this course will make a *difference* in the way you do your job?	1	2	3	4	5
		None				**Substantial**
5.	How much training (self-guided or classroom) have you already had on this subject matter?	1	2	3	4	5
		Not Useful				**Very Useful**
6.	Overall how would you rate the *usefulness* of this course?	1	2	3	4	5
7.	To what extent did the course provide the following:	**Not at all**				**Completely**
	a. Applicable theory	1	2	3	4	5
	b. Practical examples	1	2	3	4	5
	c. Time for discussion	1	2	3	4	5
		Not at all				**Completely**
8.	Did the course meet your *expectations*?	1	2	3	4	5

a.

b. *Please continue on back of page*

9. How would you rate the following aspects of the course?

	Very poor				Excellent
a. Course content	1	2	3	4	5
b. Organization of the course manual	1	2	3	4	5
c. Organization of the training	1	2	3	4	5

10. Please rate the following aspects:

	Very poor				Excellent	
a. Hotel facilities	1	2	3	4	5	n/a
b. Meeting rooms	1	2	3	4	5	n/a
c. Handouts	1	2	3	4	5	n/a
d. Use of graphics/PowerPoint	1	2	3	4	5	n/a
e. Demonstrations	1	2	3	4	5	n/a
f. Group discussions	1	2	3	4	5	n/a

11. Comments (on the facility, rooms, materials, approach to training, etc.):

12. If you were given the task of redesigning the course, what would you change?

13. Any additional comments or suggestions?

Note: We will conduct a follow up evaluation in 3-6 months to obtain your additional comments and suggestions. Thank you!

Follow-Up Surveillance Course Evaluation

Introduction

If live interview: Thank you for agreeing to speak with me today.
If questionnaire: Thank you for taking time to complete this questionnaire.

You were a participant in the <*course name*> course held in <*city, country*> from <*course dates*>. We are currently conducting a follow-up evaluation of the course. We rely on honest and detailed feedback. By doing this, we will learn ways we can make the course more useful.

Objectives of the Follow-Up Evaluation

- To determine whether the training you received has enhanced your ability to do your job and increased your skills
- To assess both which aspects of the training you found most useful and those that should be changed
- To evaluate whether and to what degree the training has changed how surveillance activities are conducted in your organization or country.

Methods and Confidentiality

Please be as honest and detailed as possible. The information you provide will only be used by CDC surveillance training personnel. It will be treated as confidential. The information you provide will not be reported to or shared with anyone in your workplace including your supervisor. Your participation will not affect your employment status in any way. This <*interview/questionnaire*> should take no longer than 20 minutes of your time. Do you have any questions?

Consent

If interview: I give my consent to participate in this evaluation.
If questionnaire: I give my consent to participate in this evaluation.

Print name and date: ____________________________________

Signature and date: _____________________________________

For office use only

Date: _______/_______/_______

Time: No:

Your Name:

Updates to Personal and Occupational Information

1. Has there been a change in your job title since the course?

   - ☐ Yes
   - ☐ No

   a. If yes, new title: ______________________________________

2. Has your employer/organization (i.e., MOH, university, WHO, CDC, NGO, etc) changed since the course?

   - ☐ Same organization
   - ☐ New organization

   a. If new organization, please name:

   ____

3. At which level do you now work?

   - ☐ Site/Center Level
   - ☐ District/Regional Level
   - ☐ National/Central Level

4. If your employment position has changed since you participated in the training, was the change self-initiated or employer-initiated?

   ☐ Self-initiated ☐ Employer-initiated ☐ No change

   a. Do you believe the training affected your change in position?

   ☐ Yes ☐ No

5. Work Address if changed since the course:

6. Telephone	7. Fax	8. E-mail

Your Current Job

9. What are you doing now?

My current job responsibilities (Please check all that apply)	✓
I design surveys or studies.	
I participate in data collection.	
I review data entry forms to ensure accuracy.	
I perform data entry.	
I manage and/or clean data.	
I analyze data.	
I directly supervise staff performing any of the above data activities.	
I present and/or report data to stakeholders and/or others.	
I conduct surveillance-related trainings.	
I am in charge of program implementation and/or coordination.	
I work in information technology/health management information systems (HMIS).	
I do health education activities.	
I do direct patient care.	
I work with budgeting/financing.	
I conduct monitoring and/or evaluation activities.	
I am responsible for administrative tasks.	
I conduct public health research.	
Other responsibilities:	

Computer Usage (Please check all that apply)	✓
I use a computer in my job.	
I share a computer with others at work.	
I use a computer for word processing.	
I use a computer to generate presentations (e.g., use PowerPoint)	
I use a computer to enter data.	
I use a computer to manage and/or clean data.	
I use Epi Info 2002 (Windows version) to manage data.	
I use Epi Info 6 (DOS version) to manage data.	
I use SAS to manage data.	
I use SPSS to manage data.	
I use Microsoft Access to manage data.	
I use Microsoft Excel to manage data.	
I use STATA to manage data.	
I use other data management tools not listed above.	
Please list other data management programs not listed above that you use:	

10. Did the training you received result in your making changes to the way you do your job?

☐ Yes ☐ No

a. If yes, what kinds of changes? ____
____
____

11. Have you received additional training since participating in the course?

☐ Yes ☐ No

a. If yes, what kind of training(s)? ____

b. Who sponsored the training(s)? ____

c. What was the course content? ____
____
____

12. Since the training ended, have you used any of the printed or other materials (i.e., software) you were given during the training?

☐ Yes ☐ No

a. If yes, what materials have you used? (Please check all that apply.)

☐ Course manual
☐ Epi Info software (Windows version)
☐ Handouts

13. b. How were the materials used? (Please check all that apply.)

How Training Materials Have Been Used	✓
As a reference for myself	
As a reference for others at the district/province level	
As a reference for others at the national level	
For trainings *I taught* at the district/province level	
For trainings *others taught* at the district/province level	
For trainings *I taught* at the national level	
For trainings *others taught* at the national level	
Other ways materials were used (please list):	

<u>For Epi Info Only</u>. *Questions 14 - 17 are for the Electronic Data Processing, Analysis and Reporting course only. If you took a different course,* ***please skip to question 18, page 6****.*

14. Prior to the training, had you ever used Epi Info?

 Yes (Epi 6) No

a. If yes, how (i.e., in what context)? ______________________________
____
____

15. Since the training, have you used or are you currently using Epi Info?

 Yes No

16. Since the training, have you used any other data analysis tools/applications?

 Yes (please list): ______________________ No

17. Which of the following topics included in the training do you now find useful in your job? Please check all that apply.

Training Topic	✓
a. Designing forms	
b. Validating data entry	
c. Overseeing and performing data entry	
d. Developing and documenting data cleaning	
e. Analyzing data	
f. Cleaning data	
g. Preparing data for analysis	
h. Performing simple descriptive analysis	
i. Analyzing two or more samples	
j. Comparing three or more samples (time trends)	
k. Developing a work-related report	
l. Other topics you found useful (please list):	

All Participants

18. Have you requested follow-up technical assistance (TA) on a topic related to this course?

    ☐ Yes ☐ No

    a. If yes, what was the type of TA request? ______________________________________
    ____

    b. To whom was the request made? ____

    c. Was TA provided?

    ☐ Yes ☐ No

19. Did you see a change in any of the systems with which you are currently involved as a result of the training?

    ☐ Yes ☐ No

    a. If yes, how? ____
    ____
    ____
    ____

20. Do you perceive any barriers to your ability to be able to apply the skills you obtained during this training (e.g., lack of time, support, equipment)?

    ☐ Yes ☐ No

    a. If yes, what are these barriers? ____
    ____
    ____

21. On the whole, was attending the training a worthwhile experience for you?

    ☐ Yes ☐ No

    a. Why or why not? ____
    ____
    ____

22. Do you have any suggestions for changing the course? ______________________________
____
____
____

Future Surveillance Activities

Do you feel you have everything required to fulfill the responsibilities of your job?

What could be done to further improve your current job, position, or organizational situation?

Any other comments?

Thank you for completing this questionnaire! We appreciate your opinion.

Notes

Appendix C. References

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