FACILITATOR GUIDE

Facilitator Training Guide for HIV Surveillance

World Health Organization
Regional Office for South-East Asia

2007

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Other HIV surveillance training modules of this series

Module 1 - Overview of the HIV/AIDS epidemic with an introduction to public health surveillance: participant manual

Module 2 - HIV clinical staging and case reporting: participant manual.

Module 3 - HIV serosurveillance: participant manual.

Module 4 - Surveillance for sexually transmitted infections: participant manual.

Module 5 - Surveillance of HIV risk behaviours: participant manual.

Module 6 - Surveillance of populations at high risk for HIV transmission.

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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). Activities for surveillance.

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;
- 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.

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 practise the teaching techniques and approaches that will fit their audience best.

For electronic data processing, analysis and reporting on HIV Surveys, facilitators should be experts 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:

- a description of the surveillance curriculum that is developed and ready for adaptation in your country;
- scheduling suggestions;
- ideas for what to include in the training;
- planning tips and checklists;
- adult education training and presentation tips.

Notes

UNIT

1

The Surveillance Curriculum

Available Courses

The surveillance curriculum provides continuing education materials for working adults, which is as follows:

- Introduction to HIV/AIDS and STI Surveillance for concentrated epidemics (2nd generation surveillance)
- Introduction to Behavioural Surveillance for High-Risk Populations, two modules:
    - General information
    - Information and specific approaches on at-risk populations

Table 1.1 begins on the next page. It lists details of the currently available training courses above.

Table 1.1

Available Surveillance Modules and Courses.

Introduction to HIV/AIDS and STI Surveillance for *pre-service* national, provincial or district-level surveillance personnel or existing staff for new country programmes or others involved in universal and sentinel surveys.

Module/Course Length, Materials	Description
• **Module 1, Overview of the HIV/AIDS Epidemic and Introduction to Public Health Surveillance, 1 day** • **Module 2, HIV Case Reporting, 1+ day** • **Module 3, HIV Sero-Surveillance, 1+ day** • **Module 4, Sexually Transmitted Infection Surveillance, 1+ day** • Modules 1, 3 and 4 were piloted in New Delhi in March 2006 to a bi-regional WHO-SEARO and WPRO audience.	**Module 1** presents an introduction to the HIV/AIDS epidemic including the epidemiology of the disease and public health surveillance measures to combat the disease. *Objectives:* After completing this course, participants should: • know the three HIV epidemic states and be able to characterise the HIV/AIDS epidemic in their country • be familiar with the predominant routes of HIV transmission and the key risk factors of transmission • be able to describe the components of an effective HIV surveillance system and the elements of second generation HIV surveillance • understand the ethics involved in HIV surveillance and be aware of potential harm to individuals and to populations • be able to develop a plan for evaluating their own country's surveillance system. **Module 2** introduces HIV case surveillance with an emphasis on WHO case clinical staging and surveillance case, ethical and confidentiality considerations, analysis and presentation of surveillance data and operationalising HIV case reporting system. *Objectives:* Participants will learn how to: • set up HIV case reporting system • analyse reported HIV and AIDS data • use surveillance data for prevention, care and treatment planning • monitor the HIV case reporting system This course incorporates development of country operational plans and action planning to implement the plans.

Continued

Introduction to HIV/AIDS and STI Surveillance, *continued*

Module/Course Length	Description
Introduction to HIV/AIDS and STI Surveillance, *continued* **Materials:** • Participant manual • Facilitator manuals • Slides	**Module 3** provides the key issues in HIV surveillance and complementary surveillance techniques for tracking the epidemic, focusing on the steps to conducting unlinked anonymous HIV sero-prevalence surveys at antenatal clinics. After completing this course, participants should: • understand the criteria for selecting sentinel populations and be able to identify specific groups and sites in their district that are suitable for sentinel surveillance • be able to identify appropriate sampling schemes depending on the situation and the target population and create a sampling frame • understand the considerations that determine which HIV testing approach is suited for HIV surveillance in their country and describe the advantages and disadvantages of different HIV testing options • be able to describe the staffing, training and supervising requirements of HIV sentinel surveillance • identify the key variables that can be used in the analysis of HIV sentinel surveillance data. **Module 4** describes the interaction between HIV infection and sexually transmitted infections (STIs). The module describes how to develop and operate systems for STI surveillance in the context of Integrated Disease Surveillance (IDS). After completing this course, participants should: • understand the inter-relationship between HIV and STIs and the principles of Integrated Disease Surveillance (IDS) • be able to explain the difference between aetiologic and syndromic case reporting • understand the advantages and disadvantages of STI universal case reporting and sentinel surveillance and when each should be implemented • know how to ensure confidentiality when collecting, archiving and reporting STI data • be able to identify the STIs most suitable for inclusion in combined STI/HIV biological and behavioural surveillance.

Continued

Module/Course Length	Description
Module 5, Surveillance of HIV Risk Behaviours, 2.5 days **Module 6, Populations at High Risk for HIV Transmission, 2.5 days** **Status:** • Module 5 and 6 were piloted in New Delhi in March 2006 to a bi-regional WHO-SEARO and WPRO audience. **Languages:** English, Portuguese and French planned **Materials:** • Participant manual • Slides	**Module 5** introduces behavioural surveillance with an emphasis on pre-surveillance activities, measures and indicators, survey methods, sampling approaches, data use and ethical considerations. *Specific audience:* Senior-level planners and decision-makers/MoH who will not actually conduct the surveillance. *Objectives:* After completing this course, participants should: • identify the uses of behavioural surveillance • understand the methodological difficulties with indicators for behavioural surveillance and select indicators most suited to particular situations • understand sampling issues and options for behavioural surveillance and understand the criteria for choosing a sampling approach • describe the types of data analysis commonly used in behavioural surveillance and understand the steps in ensuring appropriate data analysis and use • be able to discuss the ethical consideration unique to behavioural surveillance. **Module 6** Prerequisite: Module 5. **Module 6** introduces HIV surveillance among high-risk populations. Eight high-risk populations are described in depth with recommended surveillance techniques. Detailed case studies are provided for each population to help participants think through implementation. *Specific audience*: Surveillance officers who will actually conduct the surveillance. *Objectives:* After completing this course, participants should: • be able to discuss the importance of surveillance in high-risk populations • understand the purpose of pre-surveillance assessments and the role of qualitative and quantitative research in these assessments • be able to discuss the advantages and disadvantages of various sampling approaches • be able to discuss how to choose the most effective biological and behavioural measures in surveys of high-risk groups • understand the special ethical consideration of conducting behavioural and biological surveillance among high-risk groups.

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.

- 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 and noted during lectures.
- Participants are given time at the end of the unit to look over their answers and change them if necessary 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.

Discussion questions

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

- These are class discussion questions.
- You may or may not use them 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.

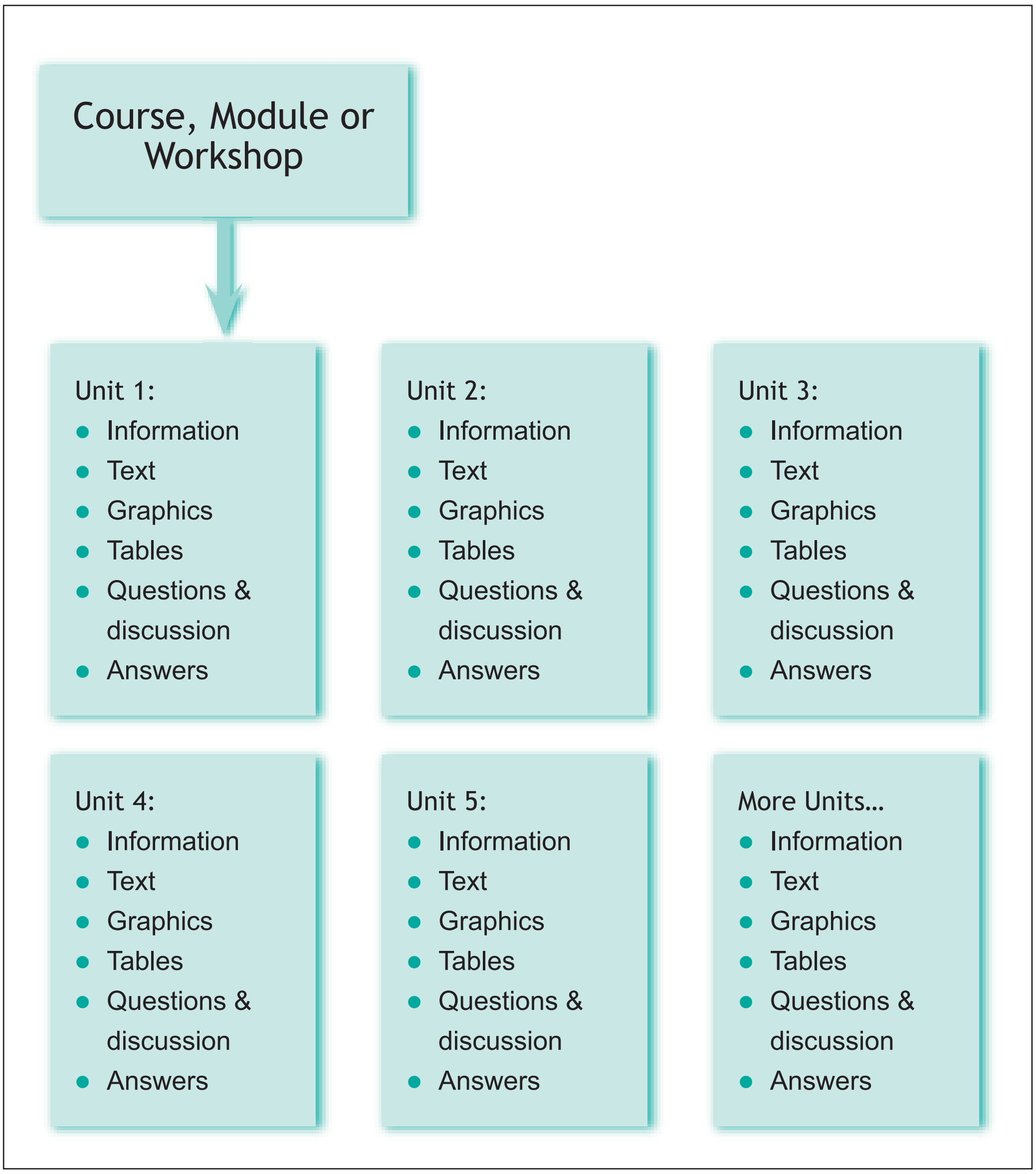
Case Study

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

Figure 1.1.

What is in a Course, Module or Workshop?

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



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.

Notes

What is not Covered

This training guide does not consider some very important preliminary steps. This is because we assume that you have already:

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

If you require technical assistance for training 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 some information and a few worksheets given later for conducting a training analysis—questions to ask about your audience and environment. Once you have decided to put on a course, these analysing questions will help you to plan and adapt materials.

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 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 training (or for experienced staff who are moving into HIV/AIDS work on the job without prior training or staff who 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 and 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:

- References and Further Reading Material
- Glossary and Acronyms
- Useful Links
- Answers to Warm-up Questions, Case Studies

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

Notes

UNIT 3 How to Adapt the Generic Surveillance Curriculum

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 do not 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 most the surveillance officers/healthcare workers.

Table 3.1

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 personnel.
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 know 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, analyse 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 on the next page. Every situation is different. Think of the needs of your country when you modify the audience analysis to suit 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) to decide:

- 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 to serve the purpose of a regular training?

Table 3.2

Training Audience Analysis: Describe a 'typical' participant who will attend the planned training.

Preliminary Title of This Course:

Now take the following steps:

- Once you have an idea of who 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 to make your training target specific.

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

Table 3.3

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 accommodation be needed for participants if course is more than for 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?		
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 and for how long. Your finished analytical document should provide:

- the preliminary title of the training
- your completed tables (Table 3.2 and 3.3)
- a detailed description of the training that is a summary of the two long tables of information you have collected about your audience and environment.

Review the analysis with your supervisor and others who have 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 part of your course but the curriculum provides far too much 'generic' information for adequate use in any one country. When you conduct training locally in a district or region, you would like to adapt the information to fit your situation and 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 of your participants.
>
> 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.

Table 3.4

Training materials preparation

Preliminary Title of This Course:

Considerations	Your Answer*	Comments
What are the proposed training dates?**		
For 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 the reviewers' names, what each would review and the time frame for completion.**		
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 before finalizing your answers.

** For longer projects, fix a draft time schedule for development. Use the data you have collected here. Take 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 upfront, there is much less chance that your materials or plans will be rejected later.
- Talk it out first to get a very clear idea of what organizations in your country should be included in the training. What are the key ideas and skills you must cover?

Process 3.1.

How to identify existing materials you can profitably 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 apparently do not 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 may 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 on any content that sounds like it fits your needs to avoid overcrowding of contents. People may want to take a quick look at the entire manual to determine the volume and suitability of the contents.
5	After the meeting, develop an outline of the topics you intend to teach and the order you want to teach them.
6	Ask your supervisor and stakeholders to approve the outline of training before you continue developing the study materials.

Develop the Study Materials

Process 3.2

Use the outline to develop your training manual

Step	Do this…
1	When the outline is approved, copy and paste the contents that were selected into your new manual.
2	Now adapt the course for your country. Add only the information that is essential for on-the-job training from your national/regional perspectives: • 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.
8	Develop media, training/job aids: a. If you are using slides, • identify slides from the surveillance curriculum that match your content • copy the slides and adjust them 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 on return to his/her job to serve as reminders as to what to do.

Figure 3.1 on page 25 shows the Analyse-Design-Develop process.

Comments on Format

Formatting a document is more than just 'making it pretty.' A great deal of research has been done on how the format influences 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, do not 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 quickly find what he/she is looking for.
- Keep paragraphs short.
- Use graphics (charts, maps, tables) to break up the text; they are also monotony breakers.
- Break the text up by using subtitles (such as Comments on format), so that readers can scan to find something quickly.

Figure 3.1

Adapting Generic Materials to Local Needs: Analyse-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 do not have time to analyse and design! Can not we just skip this step and develop the course?

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

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.

Launching 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 on, add or delete items to suit your situation.
- Show it to your supervisor, your mentor, the local CDC or WHO office or others you will work with so that everyone is in agreement with your checklist.
- Print it and use it as often as you need to keep track of your training project.

JobAid 3.1.

Advance planning of training

Initial planning (check as completed)	
Check	**Item**
	Get the support of the people and groups who would have interest in the training. Discuss your plans and ask for in your meetings ideas that will improve the training. Adjust your plans based on the outcome of meetings. Meet with any of those who are involved in your locale: • Ministry of Health officials • National AIDS Control Programme (it may have a different name in your country) officials • Officials or officers from the World Health Organization • Key non-governmental organization (NGO) representatives • Others depending on your country or region. *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? • Would you need to pay the facilitators' lodging and per diem? • Would you use a contractor to organize the training event? • Would 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? *Select staff (facilitators and 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. *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, WHO 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 venue. 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 use at the 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 in a network.

Three days before (check as completed)	
Check	**Item**
	Are accommodation arrangements for facilitators and participants correct?
	Is transport arranged, if this is to be 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.?
	Check all equipment beforehand (check in advance if you will need spare bulbs and such other things from far away; if so, get them on time) • A/V equipment • LCD, laptop and/or overhead projector • Printer • Flipchart and pens • Backup LCD or overhead projector • Adapters, converters, spare bulbs if you have a backup projector • Posters

Last minute: day before (check as completed)	
Check	**Item**
	Test electronic to make sure everything works.
	Facilitator and Support Staff meet to discuss key questions • 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.
	Review and prepare the final contact list. Include: • Participants • Facilitators, support staff • Other local contacts as appropriate • Print a large font version of the contact list so that each person can verify his/her 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 • Three to six-month follow-up evaluation or site visit/observation. Sample evaluation forms are provided in Appendix B.

Notes

UNIT 4

Sample Course Schedules

Registration

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

- verify his/her 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 at Appendix B).

Sample course schedules

Sample course schedules start on the next page. Copy and paste any that fits your situation; then update it to fit into your plans. The two sample agendas give an idea of how to organize class time when you present:

- introduction to HIV/AIDS and STI surveillance (one week)
- teachback training of trainers' course (one week).

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 practise 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 to accomplish 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 at the end of each day for exchange of views with the participants to elicit their 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 criticize anything or offer freely their suggestions).
- use a written feedback sheet for getting participants' feedback.

A sample daily evaluation form is provided at Appendix B.

End of day facilitator meeting

After the participants have left for the day, have a facilitators' 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 necessary adjustments were made to:

- start the class start earlier
- spend more time on a topic of special interest
- request facilitators to 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 a rectangular classroom shape
- make group work feedback more structured and focused.

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

Sample Course Schedules

Sample course schedules (agendas) begin at the next page. Adjust these to fit the contents being covered. To get a realistic idea of how much time is to be allowed for each topic, request your facilitators to review the schedule and materials they want to cover and then decide the optimum time needed for a topic.

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 the 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 the 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 the Day Evaluation, Focus Group	

Notes:

- Continue to adjust the course as may be 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 the 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, if any, needed and next steps.

Sample 2: Surveillance Training of Trainers' Schedule

Teachback methodology

Facilitators present a training of trainers (TOT) course employing the teachback methodology. Participants practise:

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

For every 12 participants, you will need 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 = five 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 day course begins. This allows the first day, which is very full, to stay on schedule.

Sunday, pre-registration

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

You will need a large room where all participants can be accommodated. 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 of 12 participants each (so a big room and a breakout room are needed); there should be a subject matter expert and training specialist in each room;
- divide each group of 12, into four teams of three each.

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.

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 Screening	
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 the Day Evaluation, Focus Group	

Notes:

- Facilitators and training specialists meet end of the day to discuss need for 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 the 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 the 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 the 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 by an Expert	
10:00 – 10:15	Tea/Coffee Break	
10:15 – 12:00	Expert Lectures or Presentation by an Expert	
12:00 – 1:00	Wrap-Up, Final Question and Answer Session, Next Steps	
1:00 – 1:30	Closing and Final Evaluation	

Notes

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 one is engaged in training as a facilitator.

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 lack of knowledge 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 in the 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?

Table 5.1

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

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.

Do this…	Avoid this…
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.	1. Sticking to the agenda no matter what, even if it 'does not fit.'
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.	2. Training that is too didactic, too 'university' like with too much lecture, too many slides. Participants come out of the training **not knowing what to do** back on the job. Examples of what **not** 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 programme *without giving participants a chance to discuss the situation and what to do in their country.*
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 programme, 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.	

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.

Do this...	Avoid this...

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 **what currently exists** 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:
  ◦ about their previous experience and training in the topic you are teaching
  ◦ what they hope to gain from the training
  ◦ 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.
	1. Delivering the same lecture over and over again 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 **cut the amount of content** and include practice and discussion.

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.

Do this...	Avoid this...

1. Practise the things you want participants **to be able to do** 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 participants can really use and take back to work. Examples:
  ◦ Develop country operations manuals in class
  ◦ Develop a country protocol (for regional trainings, break up into country groups)
  ◦ Conduct action planning for how participants will 'roll out' new training or a new protocol in their country.
	• Lecture and slides.
	• An enormous amount of content to 'cover'.
	Lecture and slides are the **quickest way** 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.

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 5.2

How to address learning styles

Learning style	How to address
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.
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.
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 5.2

Types of learning

Variety of learning defined	Examples	How to deliver and test
Knowledge: facts, information or content. Most training consists of transferring to participants information and ideas.	• the history of the computer • how the computer can be used • the benefits of one computer programme 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 organize 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 that the workers would 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.

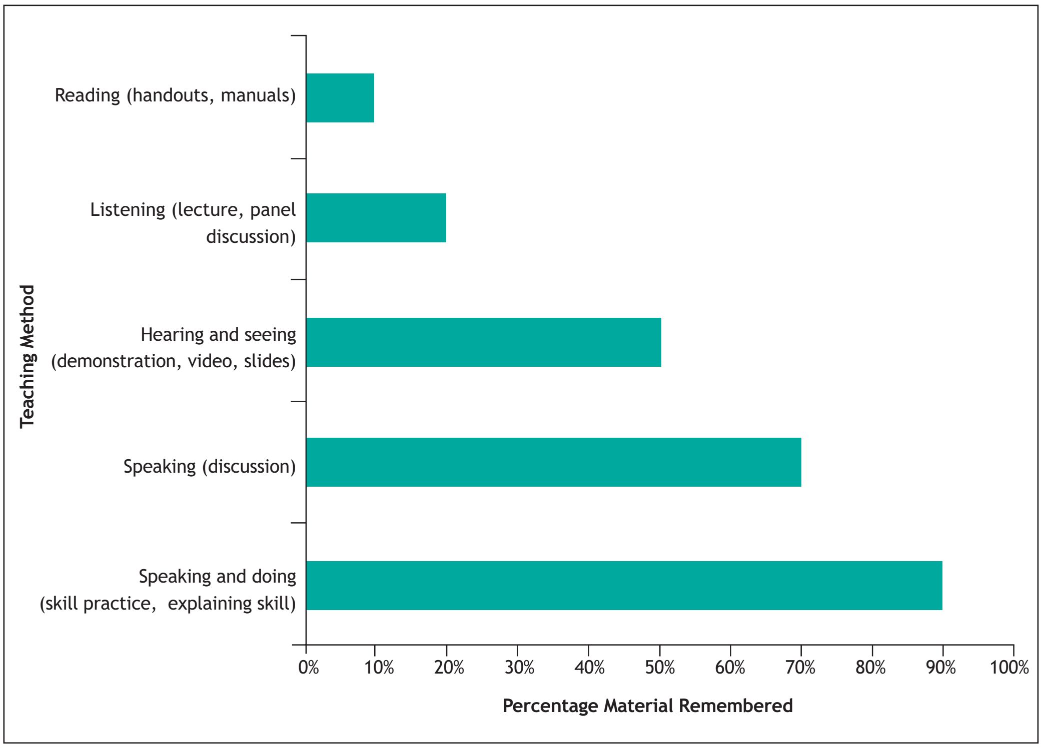
How Your Presentation Affects Participants' Memory

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 5.1

Relationship of teaching method to what adults remember.



Try to impart knowledge, skills and attitudes that would be needed on the job.

Notes

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 still, trying 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 contents 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 have been looking forward to this…", "I am 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 parts of their job, etc.
  - Then have each person introduce his/her 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, favourite foods and so forth.
  - Have the group mingle to find one person having common 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 have 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 duration 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 again what you had told them earlier. 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, perceptions 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 or perceptions of participants and co-trainers even when they express thoughts 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 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

Question-answer sessions are an important part of training. They help you see how well the participants are absorbing new information and skills. Questions may alert you to participants' concerns. Used effectively, questions also help to facilitate and stimulate 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 during lectures
  - inviting participants to share their knowledge with each other (rather than you answering every question posed by participants).

- **Avoid embarrassing participants by putting difficult and unusual questions that they can't answer.** Ask for volunteers to answer questions and participate in training events.
  - Do not put participants 'on the spot' by showing any special liking for a particular individual.
  - If you pose a question that no one volunteers to answer, simply rephrase the question and wait for participants response.
  - 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 is a number of questions or comments, try to group them according to topic.
  - Again, draw on the group's collective experiences. Diversify your questions by asking both simple and complex questions.

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

Table 5.3

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 the scope of what the participants may 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.	• Would you tell me more about that? • 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
- That 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**
  - By providing them opportunities to share their experiences and expertise with you and with each other
  - Offer sincere praise to individual participants 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 in culture, gender or age) and encourage participants to do the same to each other.
  - Avoid making personal comments even when teasing participants or joking with them.

- **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:
  - showing respect for other people's ideas or perspectives
  - speaking loudly enough for everyone to hear
  - do not interrupting other people
  - starting and ending 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.
- 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 measures to keep to the time-schedule.

- **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 elaboration. 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 the classroom or during breaks.

- **Keep the discussion on track.** When a participant's comments start moving the discussion astray, 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 the course of training, difficult situations and disruptive interpersonal misunderstandings may arise. Be prepared to deal directly and diplomatically with these situations to help minimize 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 or monopilizing talking**. Try this strategy:

  - ask the monopolizing participant to wait to speak further until others have had a chance to talk, since every participant deserves an opportunity to talk;
  - gently interrupt the participant, summarize 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 disturbing amity and decency. 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 perceptions that have been expressed.

- **Minimize 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 impart 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 commencement of training is to make sure that you are prepared and relaxed when you stand up to speak and give lessons.
- your eyes, voice, expression and how you stand and move.
- ease with which you use visual aids.

Rehearsal

There is no substitute for rehearsal to help you to feel prepared, confident 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 orally and visually than the time it takes for them to complete them 'in their heads.'
- Using a flipchart or other visual aids also adds to the time needed for presentations.

Rehearsing before you deliver training lectures helps you plan better the length of your presentations and activities. You may identify aspects that are not clear enough or confusing.

How to rehearse

It is better to finish a presentation or activity slightly earlier than to drag it over time. Try these rehearsal tips to get ready.

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

- **Rehearse with visual aids**. Get familiar with the technology and also where you will stand for maximum effect.

- **Rehearse in front of a small group**. Get one or two friends to give you feedback.

- **Accentuate your gestures and vocal presentation**. Get used to your own sound.

- **Time yourself**. You can determine in advance the time needed to explain the subjects for better time management.

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 enliven your presentation**. Experienced facilitators learn to welcome and use the extra professional excitement they feel when they present and facilitate in front of a group.

- **Take a moment to re-group**. If you lose your chain 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 loud enough so that you can be heard clearly by all the participants 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 easy and more humorous. But stay relaxed and composed to put your audience at ease.

- **Try to modulate your voice to maintain participant 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 an interesting topic.

- **Vary the pace of your speech**. This helps maintain participants' attention. Do not rush with your ideas or action.

Facial expression

Participants watch your face which reflects your mind. 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 you to find out. As in normal conversation, your meaning gets more clear and meaningful by facial reinforcements.

- **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 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 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 a bit complex and need to be elaborated?"

- **Make sure that your facial expressions look 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 convey a great deal about you. The least you must do is to make sure your stance does not convey boredom; at best, you can use your whole body language 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 projection
    - work out an equation on the black or whiteboard
    - walk among the participants in the room while asking and answering questions.

Moving around the room also gives you a chance to strengthen your contact with the participants by closing up 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 facilitate its retention for prompt recall in future
    - explaining information which can be more easily displayed than discussed
    - adding humour and entertaining participants
    - helping to pace presentations.

Remove a visual aid that does not 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 in such a way that the words can be read from the rear 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 and 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 would not know whether to read along or listen to what you are reading.

Facilitating Effective Group Discussions

Establish ground rules

Depending on the group composition, 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 too many 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 additional 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 observations.

- Break up the large group into pairs or smaller groups to encourage participation of all.
- 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 take their chances first.
- Accomodate the ideas of as many of the group members as possible.

Notes

Appendix A

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, seniors 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. These are called 'pretest' and 'posttest' respectively. 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 participants will have to do what was taught.
- You could test just 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, supervisors 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 that way.

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 groups or written tests)
- 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).

Training Activity
Location
Date

Skills Assessment (pre-training)

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

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
☐ Any 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, training 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			
Behavioural 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 analyse 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 programme 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 programmes not listed above that you use:

20. Please list three ways to improve current HIV/AIDS surveillance activities or training 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
Programme Planning and Improvement			
Advocacy/Policy			
Monitoring and Evaluation			
Planning for Interventions			
Programme Evaluation			
Marketing and Education			
Training			
Any other (please describe):			

Training Activity
Location
Date

End-of-the Day Evaluation, day ________
Please tell us how to improve this workshop.

1. How well were you able to understand today's presentations?
   ____ Very well
   ____ To some extent
   ____ 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

4. Did you feel comfortable asking questions? _____ Yes _____ No

Please explain: ____

____

____

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

____

____

____

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

____

____

Training Course Title
Location
Date

End-of-the-course evaluation

Name (optional)**:**

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

Thank you for taking time to complete this questionnaire.

You were a participant in the <*course name*> course held in <*city, country*> from…to… <*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 in which 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 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 supervisors. 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

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 changed since the course?

☐ Same organization
☐ New organization

a. If new organization, please name:

____

3. At which level do you now work?

☐ Site/Centre 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 analyse 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 programme 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 programmes 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 training I taught at the district/province level	
For training others taught at the district/province level	
For training I taught at the national level	
For training others taught at the national level	
Other ways materials were used (please list):	

All participants

14. 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

15. 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? ____

____

____

16. 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? ______________________________

____

____

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

☐ Yes ☐ No

a. Why or why not? ____

____

____

18. 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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Notes

The training guide provides useful information about planning and organizing training activities for surveillance of HIV, AIDS, STI and risk behaviours. This training guide also describes steps for adapting the surveillance curriculum for staff working at district, regional/provincial and national levels. The guide will be useful for training directors and facilitators. It includes:

- a description of the surveillance curriculum that is developed and ready for adaptation in the country
- scheduling suggestions
- ideas for what to include in the training
- planning tips and checklists
- adult education training and presentation tips.

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