

# Turning To One Another

## Workbook



**AIDS Bereavement and Resiliency  
Program of Ontario**

*Presence. Compassion. Change.*

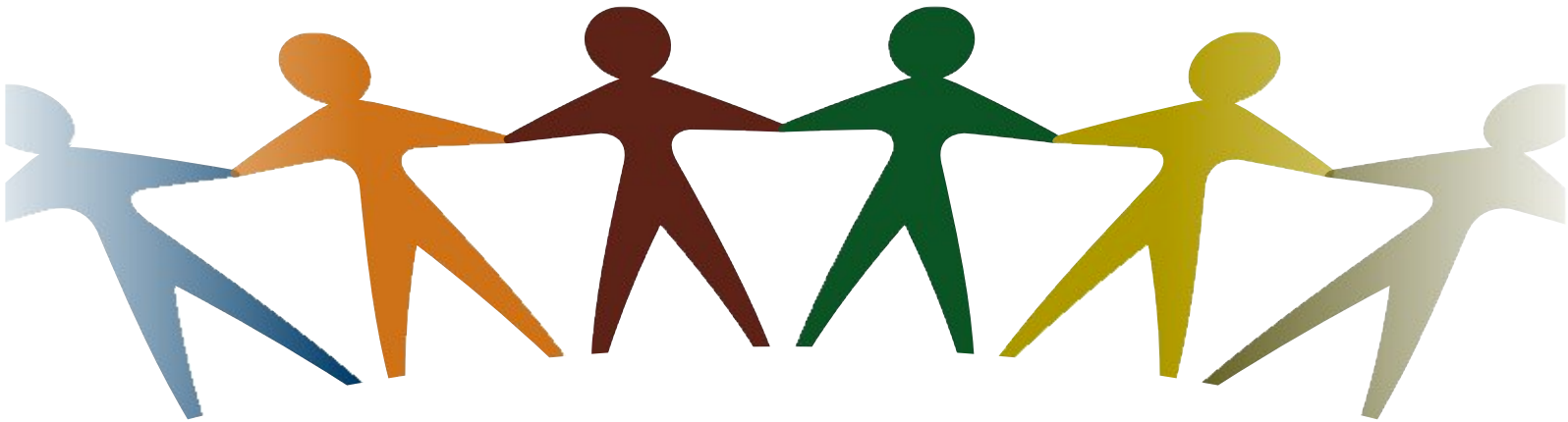
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## *Workbook*

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## Table of Contents

Introduction	3	
<b>Section 1</b>	<b>TTOA Best Practices Framework: Core Materials to Support Meaningful PHA Involvement</b>	<b>5</b>
1. PHA Facilitator Training Core Competencies Framework	7	
2. TTOA Code of Conduct and Accountability	11	
3. Holistic Check-in: Supporting Healthy Change	15	
4. Communication Core Competencies: Levels of Self-disclosure	16	
5. Structured Feedback Guide and Form	17	
6. DESC Conflict and Clearing Process	19	
7. Organizational Implementation Form	20	
8. Central Tensions in TTOA Implementation	22	
9. Resources: PWA Peer Leaders Terms of Reference	23	
<b>Section 2</b>	<b>Peer Facilitator Skills Training Resources: Supporting an Ongoing Adult Learning Process</b>	<b>31</b>
<b>STEP 1: Preparation - Facilitator Skills and Group Dynamics:</b>		
Peer Learning Contract	33	
<b>STEP 2: Presence - Self-awareness and the Emotional Dimension</b>		
Practicum Planning	34	
Practicum Planning: Completed Example	35	
Practicum Supervision Planning: Comparing Learning and Facilitation Styles	36	
<b>STEP 3: Practice - Peer Learning</b>		
Practicum Development Form	38	
Practicum Development Form: Completed Example	41	
Peer Facilitator Competencies: Assessment Worksheet	45	
Peer Facilitator Competencies: Completed Example	51	
Practicum Report	56	
Practicum Report: Completed Example	58	
<b>Section 3</b>	<b>Measured Success in Pilot Project, 2009-2012</b>	<b>61</b>
1. Participant Feedback on Successful Adult Learning Techniques Utilized in PHA Facilitator Training Series	63	
2. 'Turning to One Another': Evidence and experience demonstrating greater involvement of PHAs in support services and leadership in Ontario's community-based AIDS Service Organizations	67	
3. Essential Elements of Successful Adult Learning Techniques Utilized in PHA Facilitator Training: Learning Styles, Leadership and Dialog in a Safe Environment	71	
4. Need For Organizational Tools And Processes Identified Through Participants In Turning To One Another Pha Engagement Project In Ontario	72	



## Introduction

'Turning to One Another: AIDS Service Organization Workers Engaging with People Living with HIV/AIDS to Bring the Greater Involvement of People Living with HIV/AIDS to Life' was a project initiated in 2009, working with 13 pilot site ASOs in Ontario, to develop new processes and resources; it is commonly known as TTOA. It has its origins in collaborative work between the AIDS Bereavement and Resiliency Program of Ontario (ABRPO) and Ontario AIDS Network (OAN) PHA Programs. A fuller description of the project components and research findings is in Section Three, 'Turning to One Another'.

**The purpose of TTOA is to work with People living with HIV/AIDS (PHAs) and staff of AIDS Service Organizations (ASOs) in Ontario to concretize the experience of meaningful involvement for PHAs.** It addresses several of the hurdles to PHA involvement noted in the Living and Serving II report, particularly the relationship between ASOs and PHAs in their communities. We recognize that not all ASOs have the financial and/or staff resources to develop, deliver and support their own Facilitator Trainings. There is a current willingness and interest to strengthen community programming through greater involvement of PHAs. TTOA is a response to a call from PHA community members for training, support and opportunities for practice and mentoring, both at an individual and organizational level. Creating and sustaining robust involvement over time will require both PHAs and workers in ASOs (both + and -) to shift their view of client PHAs as primarily *recipients* of services.

**Thank you to all 73 PHA Peer Facilitators and 27 ASO workers whose active participation and contributions have created the learning and new processes contained in this workbook.**

Through a sister project of TTOA, PHA Capacity-building, a training binder was developed entitled, Models of Capacity-building Innovations in PHA Community. The original training was called PHA Facilitator Training to reflect the multiple impacts of HIV/AIDS on a person's experience of community facilitation. In 2012, the TTOA Working Group decided that in order to support people locally integrating into their agencies, that people trained as PHA Facilitators can be generally called Peer Facilitators, therefore both terms may be found in these materials.

We are pleased to share all resources related to this project, available for download at [www.abrpo.org](http://www.abrpo.org). Contact us for more information and to share your feedback.



# Section 1

## TTOA Best Practices Framework: Core Materials to Support Meaningful PHA Involvement

These materials provide key foundational processes for creating and maintaining new roles and working relationships between PHAs and ASO workers.

1. Peer Facilitator Training Core Competencies Framework
  - Presents model with detailed skill areas.
2. TTOA Code of Conduct and Accountability
  - Developed by TTOA Working Group to support full participation.
3. Holistic Check-in: Supporting Healthy Change
  - Transitioning into all meetings or events with increased self-awareness.
4. Communication Core Competencies: Levels of Self-disclosure
  - Significant skill area.
5. Structured Feedback Guide and Form
  - Tool for on-going participant engagement and process refinement.
6. DESC Conflict and Clearing Process
  - Supporting individual and group development.
7. Organizational Implementation Form
  - Structuring the complex elements of local planning.
8. Central Tensions in TTOA Implementation
  - Tracking potential areas of difficulty.
9. Resource: PWA Peer Leaders Terms of Reference
  - Extensive policy document of pilot site.





## Peer Facilitator Training

### Core Competencies Framework

***Purpose: Community facilitation with a leadership dimension***

***When facilitation is effective, participants are empowered, enabled and encouraged to contribute to changing their own circumstances and the circumstances of their communities.***

#### Training Objectives:

By the completion of this training, successful Peer Facilitators will be able to:

- Act as a facilitative leader
- Assess a group's situation and needs
- Apply effective facilitation techniques to work with a variety of settings
- Facilitate a group toward an intended outcome or learning objective
- Facilitate brainstorming, problem-solving, and decision-making processes
- Build on ideas that lead to better results
- Deal with challenges to the group process
- Conduct interactive group discussions and learning opportunities
- Attend well to both the *content* and the *process* of group interaction
- Use structured feedback and evaluation tools
- Have resources and supports set up to attend to ongoing self-care

#### Training Components

##### **I. Self/ Presence**

- Character and Style
- Ethics and Values
- Boundaries
- Self-Care

##### **II. Engaging with Others**

- Fundamentals of Adult Learning
- Understanding the Peer Relationship and How to Connect

- Communication Skills
- Team Interaction Skills
- Managing and Supporting the Emotional Dimension
- Giving and Receiving Feedback
- Working with Differences /Cultural Competence

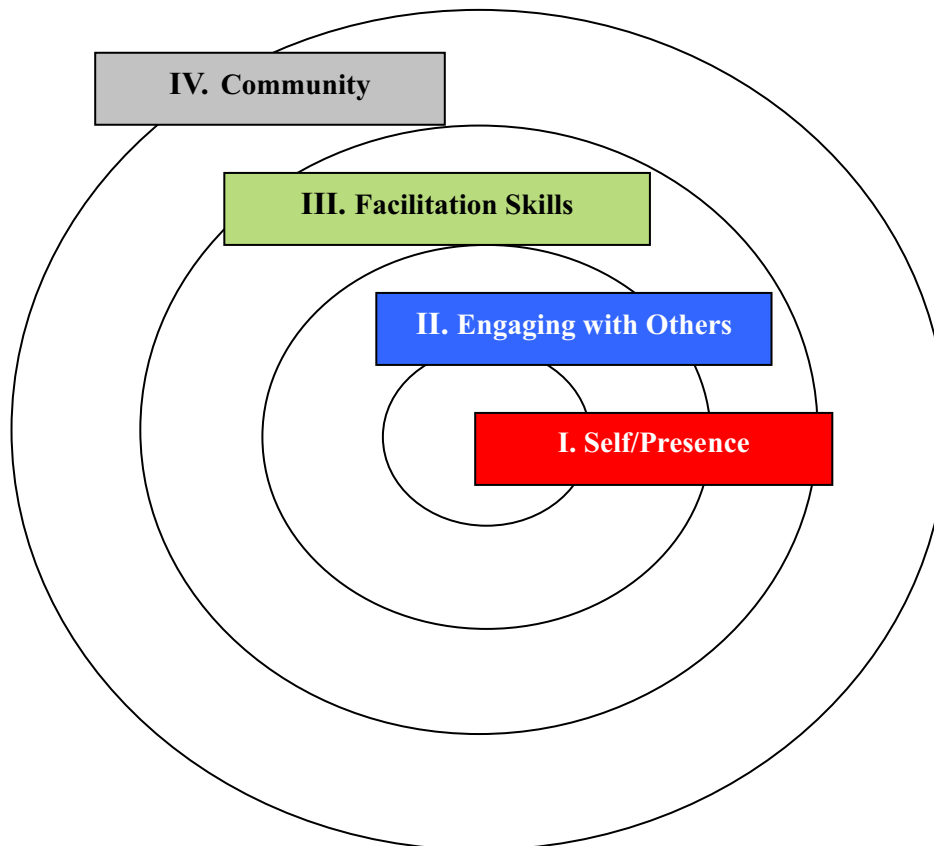
### **III. Role of Facilitator**

- Facilitation Basics
  - Practical Skills
  - Process Skills
  - Problem-Solving Skills
- Stages and Tasks of Group Formation and Group Dynamics
  - Forming
  - Storming
  - Norming
  - Performing
  - Transitioning/Transforming
- Group Basics:
  - Prepare, plan, set goals
  - Establish ground rules
  - Use questions to solicit information and different perspectives
  - Develop and use active listening
  - How to give feedback and direction
  - Strategies to help groups be more productive
  - Effective brainstorming
  - Using group problem solving techniques
  - Overcoming common group problems
  - Closing and Evaluating
- Dealing with Difficult Dynamics
- Working with a Partner
- Debriefing, Support, Supervision
- Ongoing Learning

### **IV. Leadership in Community**

- In the real world....Practice and Practicum
- Developing your Action Plan
- Engaging organizations and community members
- Strategizing around challenges
- Reflecting and Making Meaning of your experiences and opportunities

## Facilitator Competency Levels



**Level I: Self** – The small circle at the centre represents core competencies relevant to learning leaders. These include character, ethics, style, and creativity.

**Level II: Engaging with Others** - The next circle focuses on the core competencies of individuals participating in groups and teams. These include Communication Skills and Team-Building Skills

**Level III: The Role of Facilitator** - The third circle emphasizes core competencies relevant to the specific task of facilitation in a variety of group settings. These include attributes and skills in managing both content and process of group interaction.

**Level IV: Leadership within Community** - The fourth layer represents core competencies for individuals engaging in a leaderful way in their communities. This includes working in community and organizational settings, appreciating the complexities of multiple roles.

## Our Rating Scale

**A.** Learner has demonstrated mastery of the expected training competencies at this stage of their development

**B.** Learner has demonstrated proficiency on the expected training competencies at this stage of their development

**IP.** (In Progress) The learner has not demonstrated full proficiency on the training competencies or has a significant amount of work to do to meet those expectations at this stage of their development.

### Ratings description:

#### **A.**

- Solid grounding in the theory and practice behind the content and processes presented
- Demonstrates competency with a high level of skill and self-confidence
- Acts as an example for fellow learners
- Contributes to the knowledge in the group
- Accurately and consistently integrates knowledge and skills into practical application during the training and to their own context

#### **B.**

- Demonstrates the competency on a regular and predictable basis in the majority of situations
- Knowledge is in the development stage in relation to theory and practice of the topics and processes
- Demonstrates at a skill level where appropriate risks are taken but the skill demonstrated is at a “developmental” as opposed to a “mastery” level
- Demonstrates the skill with encouragement from others, as opposed to in a self-directed manner

#### **IP.**

- Little or no demonstration and application of skills, knowledge and process presented in relation to a competency
- Individual is not open to learning or has difficulty in receiving constructive feedback and acting on the learning opportunities provided

Levels of “learning”- demonstrates an understanding of the material, can apply it appropriately, can support and teach others about this material, can inspire and motivate others to apply the learning in their unique situation.

## ***“Turning to One Another” Code of Conduct***

I, as a member of the Turning to One Another (TTOA) network of people living and/or working with HIV/AIDS, am **committed to building a strong, empowered, responsible and ethical community.**

I commit to operating in a **respectful manner that illustrates and values my personal and community integrity.**

These commitments will guide me in all areas of my work, including within my home agencies, provincial agencies and all resulting relationships. I am individually responsible and accountable for my own words and actions.

I understand that in my community, confidentiality is essential in order to ensure personal and professional safety, so that everyone can feel free to participate fully.

I understand that my community consists of people from diverse racial and cultural backgrounds and sexual identities, with individual life experiences. I will value, respect and welcome all sources of knowledge and experience.

I also understand that it is a basic core need to be listened to, heard, and accepted with dignity and respect.

Therefore, I commit to:

- Holistic (physical, mental, emotional, spritual) respect and confidentiality at all levels of personal, professional and social interaction, including social media mediums.
- Protecting and respecting confidentiality and the trust others have put in me to hold their truths, safety and privacy.
- Treating each person as an individual by placing aside my preconceived judgements, stereotypes and personal issues.
- Giving each person the time and space they need to speak their reality by making every effort to actively listen.
- Speaking in “I” statements and using positive structured feedback.

# Accountability

I understand that as part of this community, my actions and words impact others within the community.

Therefore, I agree and take responsibility for the following:

- I am individually accountable for my words and actions at all times through all types of communication, in which I participate (personal, electronic, via a social network, etc.). I accept responsibility to be accountable for any harm to an individual, group or community.
- In the event that I may have caused harm to someone, I will take responsibility and deal directly with the person or persons that I have harmed, in order to find a mutual resolution.
- If a mutual resolution is not found, then I will acknowledge that I need some assistance, and will consult with a member(s) of the TTOA Working Group to help me and the person or persons I have harmed to find a resolution or emotional clearing.
- When I perceive that a breach of the Code of Conduct has occurred, by myself or others, I will contact a member of the TTOA Working Group in writing with details of the perceived breach.

## TTOA Working Group Support Process

The goal of the Working Group will be to support the individuals involved to communicate in a healthy manner and to facilitate a clearing or conflict resolution that is appropriate to the circumstances.

If the breach is presented as, or perceived to be, a Human Rights or Civil Rights violation, then suspension will be at the discretion of the Working Group, and include all events relating to TTOA pending an investigation, as per relevant administrative policy.

## "What Does It Mean to Walk the Talk?"

**Accountability:** the state of being accountable, liable, or answerable.

I own the consequences of my behaviour.

I acknowledge to others when I am acting in a way that does not display my integrity.

I examine my thoughts and feelings and try to discover the true motivations behind my actions.

I own and acknowledge the shadows and projections that compromise my integrity.

**Integrity:** adherence to moral and ethical principles; soundness of moral character; honesty

My choices and actions are consistent with my intentions and commitments.

I keep my promises. I do what I say I will. I walk the talk.

I will "Encourage the Heart".

**Responsibility:** the state or fact of being responsible; answerable or accountable for something within one's power, control, or management; involves accountability

I am responsible for my life, my feelings, my thoughts, my choices and my actions.

I choose my reactions.

I speak for myself and not for others: I use "I" statements.

**Action:** an act that one consciously wills and that may be characterized by physical or mental activity; something done or performed; act; deed

I take action to fulfil my commitments.

I ask for help when I need it. I move through my fears. I take risks.

**Authenticity:** the quality of being genuine, real, legitimate

I am sincere and honest in all my dealings.

I match my body language with my words and eliminate "masks".

I am aware of and own my own feelings. I speak my truth.

## ***“Turning to One Another”*** **Code of Conduct and Accountability Agreements**

### **I have read and commit to respecting the Code of Conduct and Accountability documents.**

I understand that this is necessary in order for the TTOA network to fulfill its' mission and values.

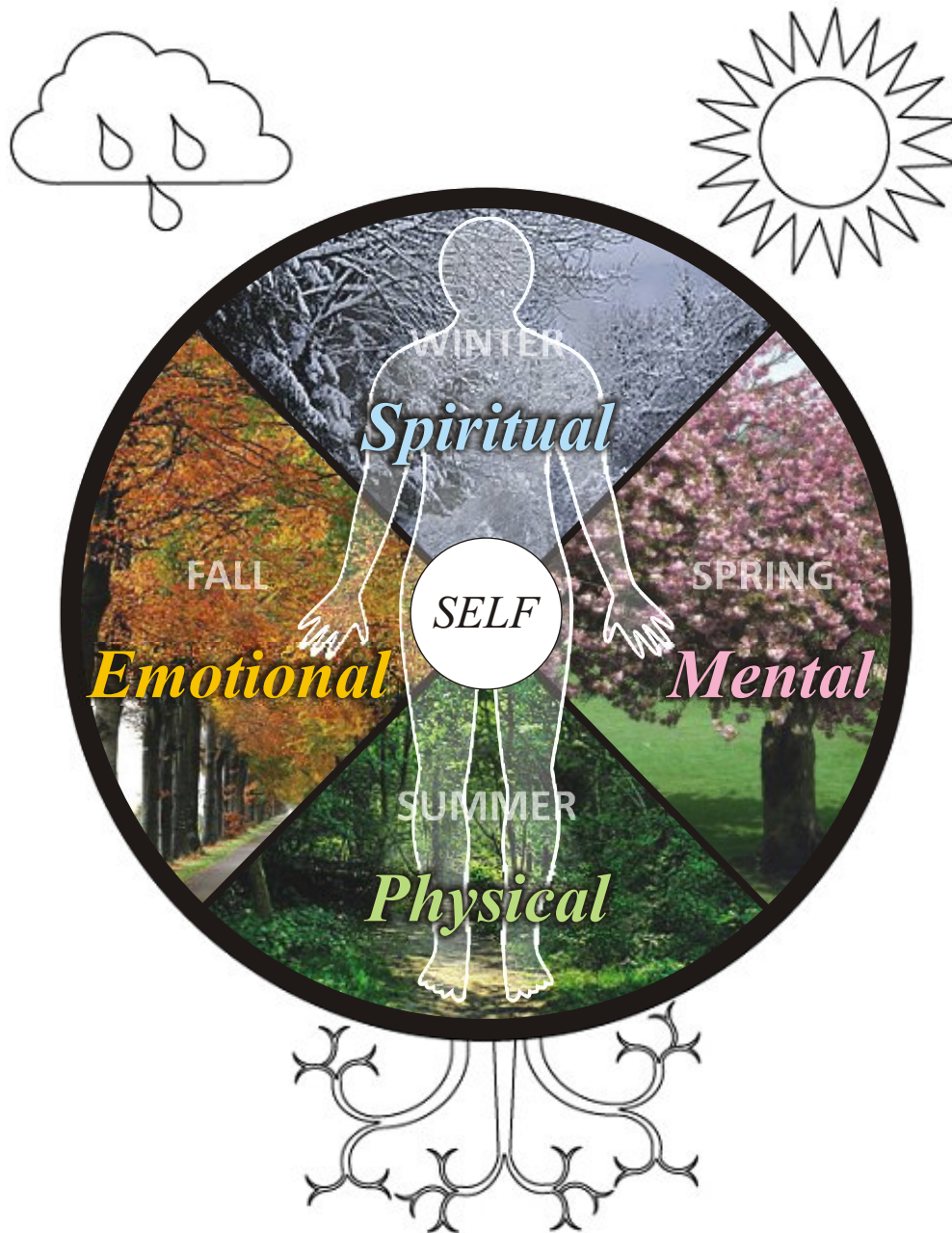
Therefore, my responsibilities include:

- I am individually accountable for my words and actions at all times. Any type of communication, malicious or otherwise, in which I participate (personal, electronic, via a social network, etc.) which causes harm to an individual, group or community, will be accountable for and have consequences.
- In the event that I may have caused harm to someone, I will take responsibility and deal directly with the person or persons I have harmed.
- If this is not possible, I will acknowledge that I may need some assistance, and will consult someone who can help me and the person or persons I have harmed, with a process of clearing or conflict resolution.
- I will follow and abide by the agreed upon process for breaches of Code of Conduct or Confidentiality that have been established by TTOA.

**Signed:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## Holistic Check-in: Supporting Healthy Change



**How am I doing?**

**What matters to me right now?**

**Am I getting the support I need?  
(don't wait for a disaster to ask for help)**

## Communication Core Competency

### *Levels of Self-Disclosure*

Self-Disclosure that supports both individual and group development depends on four major competencies:

**1. One's capacity to be aware of one's own inner experiences as they relate to reality beyond oneself**

*"I am aware of what is going on for me at all levels- as I relate to this situation"*

**2. One's willingness to risk expressing one's awareness to others**

*"I am able to risk telling it like it is"*

**3. The skill to express oneself without discounting the other person, blocking communication or harming the relationships.**

*"I have solid communication skills that enable me to speak with deep honesty AND remain connected to others"*

**4. A willingness to use one's voice to help the group interpret the meaning of events in a way that creates alignment on objectives and strategies and helps build mutual trust and cooperation.**

*"I can see how the various elements in this conversation can be linked to the overall work we are doing as an agency. The differences can help us be stronger and more effective"*

**Reflection:**

**What are the challenges you face related to these competencies?**

**At what level does your group or team communicate?**

## Structured Feedback Instructions

So what is effective feedback? Effective feedback is feedback that results in change. It really isn't very difficult to give feedback in the usual way:

- By criticizing
- By pointing out what's wrong
- By asking questions
- By telling someone a better way to do it
- Etc...etc...etc...

It's pretty obvious that generally it doesn't feel good to be criticized in this way. Most of the time when someone is given this kind of feedback they are stifled rather than encouraged to speak up or to try something new.

Effective feedback results in positive change. For this to happen, the criticism must be heard and acted upon. To maximize the chances of this happening it is necessary for the critic to demonstrate:

- Respect for the person being criticized;
- Understanding of whatever is being criticized;
- The skills to identify the positive parts; and
- Ability to indicate a useful change.

Structured feedback is a way of doing this. It is a very short, personal evaluation which contains your assessment of the positive and negative aspects of a meeting, an opinion, an idea, something someone has said or done, etc... It is also a way for co-facilitators to evaluate each other and their groups so that they learn how to be more effective.

### Structured Feedback

Briefly state at least two or three positive things about whatever it is you want to give feedback on or criticize. Two or three things you liked, learned, understood in a new way, want more of, found useful, interesting, etc...

Briefly state the single most important thing which you think should be changed. Say something like, 'I see the main problem as how to...' or 'I wish that...' NOT 'I didn't like...' or you didn't...' or You should...' or I really like that idea but...'

## Structured Feedback Form

Workshop Title: \_\_\_\_\_

Identify 2-3 things that worked well during this workshop:

Identify 1-2 wishes or concerns you may have for this workshop:

Please print your name: \_\_\_\_\_

*'LEADERS OWN THEIR WORDS'*

## **DESC System for Clearing and Conflict Resolution**

### **DESC System**

- **Describe** the problem situation:
- **Express** your thoughts and feelings about it - using I statements (be willing to be vulnerable):
- **Specific** request for change:
- **Consequences** (positive) for both of you (and the group) if your request is met:

### **Checklist for Giving Constructive Feedback**

#### **Are my comments:**

- Descriptive rather than assumptive?
- Specific versus general?
- Solicited versus imposed?
- Well-timed?
- Focused on behaviour that can change?
- Negotiated change - not demanded?

## TTOA Organizational Implementation Plan

Framework	Where are we?	What is needed?	When can it happen?
1. Positioning a lead staff to be responsible for on-going relationships with Peer Facilitators			
2. Clear understanding of roles and responsibilities of staff and Peer Facilitators			
3. Written vision/core values of program			
4. An outline of organizational contribution in time, space and funds			
5. An accountability framework (mutual expectations and what to do when something goes wrong)			

<p>6. A consistent intake process (for community consistency)</p>	<p>7. A process for regular debriefing and supervision of Facilitators</p>	<p>8. A mechanism for evaluating community events and providing feedback to Facilitators</p>	<p>9. Drafting Terms of Reference that covers items 2-8 above, including a name for the program.</p>	<p>10. Annual review scheduled for program.</p>

## Central Tensions in TTOA Implementation

'PHAs at centre' Value	Pressure >>>>	Grey Areas	Pressure <<<<	Management Perspective/Position
PHAs should be the centre and workers have things to learn from LTS PHAs.	Enabled by Strategic Plans	When PHA are staff, labelled as a victim, inadequate, 'made other' by other staff -or staff intimidated.	Limited staffing, volunteers, funding, space and transport.	Management are accountable to funders for program delivery, stats, etc.
PHAs shouldn't be fitting into agency mould.	Using GIPA as agency policy	Complexity of status disclosure to confirm that agency is "engaging PHAs". Staff and board members in challenging position/forced disclosure.	? How to prioritize?	Mgmt can't meet all PHA needs. Challenges when PHA staff can't work must re-direct tasks.
	Peer Networking PWA & ACOL as examples	Peer Leaders program - makes us nimble, creates flexibility.	Setting limits, parameters. How to say No with thought?	TTOA should be aligned with student placements, structures in place.
				Need personal balance for workers, structure for day-to-day tasks.
				Long-term sustainability of agency to consider.

## Toronto People With AIDS Foundation Peer Leaders Program - Terms of Reference



### Definitions:

- Peer Leader: A PHA who is leading a program
- Peer Mentor: A former Peer Leader who participates in a Peer Leader Initiative Group as an advisor and mentor to other Peer Leaders
- a peer: A Peer Leader program participant who is not a Peer Leader
- PHA: a person living with HIV or AIDS who may or may not be involved in the Peer Leader program
- PWA: The Toronto People with AIDS Foundation
- OAN Health principles
- GIPA

### 1. Program Objectives

- 1.1. The Peer Leaders Program is one whereby people living with HIV/AIDS who demonstrate experience, interest and/or skill in leadership, are given the opportunity to design, implement and evaluate a program of their own creation for PWA clients, while providing support to one another, within the parameters of these Terms of Reference.
- 1.2. The program will be advised by a committee (or several committees) called Peer Leader Initiative Groups, which will foster a team approach to encourage support, respect, collaboration and leadership principles. These groups will also be a forum for support and mentorship.
- 1.3. Peer Leader Initiative Groups will help fill gaps in services they identified amongst their peers.

### 2. Peer-Leader Program Standards

- 2.1. Peer-led programs will:
  - 2.1.1. be relevant to PWA clients, or a sub-set of those clients;
  - 2.1.2. not duplicate services provided by other groups or organizations;
  - 2.1.3. be provided on a reasonable scale;
  - 2.1.4. not provide or claim to provide services that are provided by a regulated profession (eg. doctors, nurses, social workers, psychologists, massage therapists), or governed by a recognized but unregulated professional body (eg. nutritionists, life coaches), unless qualified to do so; and
  - 2.1.5. conform to PWA's regular accessibility standards.

### 3. Peer Leader Statement of Identity and Values

- 3.1. Peer Leaders are a group of people who come from different communities, backgrounds, and circumstances, and yet they share a common experience of living with HIV.
- 3.2. Being a Peer Leader means demonstrating the following attributes:
  - 3.2.1. **Advocacy:** Being a voice for PHAs and the issues they face;
  - 3.2.2. **Creativity:** Coming up with problem-solving ideas and being willing to try new things;
  - 3.2.3. **Commitment:** Demonstrating a commitment to improving the lives of/ empowering people facing struggles similar to ones you are going through or ones you have now overcome;
  - 3.2.4. **Motivation:** Demonstrating leadership by motivating and inspiring other PHAs;
  - 3.2.5. **Hard work:** Showing you are willing to put in the time and effort;
  - 3.2.6. **Reliability:** Showing follow-through -- doing what you say you'll do;
  - 3.2.7. **Lack of ownership:** Championing an idea, but not owning it. The idea should be shared with peers, embraced collectively, and be able to transcend the involvement of any one individual or group of individuals;
  - 3.2.8. **Humility:** Putting service ahead of ego;
  - 3.2.9. **Spirit of Learning:** Seeking input, hearing structured feedback, and being flexible and adaptable;
  - 3.2.10. **Persistence:** Sticking to a vision and being able to overcome obstacles;
  - 3.2.11. **Patience:** Developing programs takes time, as does achieving program outcomes.
  - 3.2.12. **Respect:** Being courteous and respectful to Peer Leaders, PHAs, peers, and PWA staff.
  - 3.2.13. **Self-awareness:** Having insight into one's own needs and limits, in order to provide self-care.

### 4. Criteria for Choosing Peer Leaders

- 4.1. The basic criteria for applying to be a Peer Leader should be that they have to meet all of the following criteria:
  - 4.1.1. **HIV Status** - Peer Leaders must be PHAs;
  - 4.1.2. **Experience & Reliability** - At least a three-month history as a volunteer in good standing with PWA (other volunteer experience will be considered, with references, but if spaces in the program are limited, priority will be given to PWA volunteers);
  - 4.1.3. **Skill** - To demonstrate skill, PHAs applying to be a Peer Leader should have completed the OAN's leadership program or equivalent demonstrated training;
  - 4.1.4. **Interest** - Interest would be demonstrated by a) a well-developed proposal that would meet certain criteria; and b) a declaration that the person adheres to the Peer Leaders Statement of Identity and Values.

**4.1.5. Creativity and Suitability of the Proposal** - The applicant must have an idea for a program that demonstrates relevance to clients of PWA by:

- 4.1.5.1. targeting PHAs and;
- 4.1.5.2. either i) providing direct practical support services, or ii) empowering PHAs to become more self-sufficient or to become leaders in their own right.

## 5. Process for Selecting Peer Leaders

- 5.1. PWA staff make a preliminary screening based on meeting the criteria 4.1.1, 4.1.2, and 4.1.3 (PHA status, Experience & Reliability, Skill), and also the availability of space in the program (See Section 6).
- 5.2. Preference will be given to PWA's volunteers if spaces are limited.
- 5.3. Preference will be given to people who have not yet been a Peer Leader.
- 5.4. Applicants to be Peer Leaders will make a presentation to the Peer Leader Initiative Group of no more than 30 minutes. Support will be given to develop the presentation.
- 5.5. The presentation would cover these basic areas:
  - 5.5.1. definition of 'Peer' in the context of the proposed program;
  - 5.5.2. what is the proposed program;
  - 5.5.3. why the program is relevant to the client group (as in the criteria in Section 4);
  - 5.5.4. how the project adheres to the principles of OAN Leadership and GIPA;
  - 5.5.5. what support is required of PWA; and
  - 5.5.6. what the Peer Leaders' role will be, for how long, what accountability will the peer have, and how will their role as Peer Leader eventually be transitioned and the program sustainable.
- 5.6. The evaluation process will use the tools necessary to ensure objectivity.
- 5.7. PWA would reserve the right to make the final decision, but would seek a recommendation from the Peer Leader Initiative Group regarding Interest and Suitability.
- 5.8. PHAs with similar applications will either be encouraged to apply together, or they may be referred to other supporting roles in existing projects.

## 6. Numbers of Peer Leaders

- 6.1. PWA will determine the limit on the number of Peer Leaders, based on staff capacity to manage and supervise Peer Leaders, and based on the amount of funding available. The maximum number of Peer Leaders per group will be eight. If there are more than eight Peer Leaders, and PWA has the capacity to support additional Peer Leaders, a second group may be created.

- 6.2. If there is room in a group for new Peer Leaders, PWA will make this known to clients and volunteers.

## 7. Accountability, Responsibility and Commitments - Peer Leaders and PWA

### 7.1. Peer Leaders

- 7.1.1. Peer Leaders will adhere to PWA's Volunteer Code of Conduct. In addition, they will be accountable to the peers in their group by:

- 7.1.1.1. Respecting the confidentiality of the peers in their groups and of other Peer Leaders;
- 7.1.1.2. Having peers in their program fill out anonymous evaluation forms, which the peers will send or hand in directly to PWA staff (the frequency of this requirement will be negotiated with PWA staff);
- 7.1.1.3. Develop a process within their program for regular feedback and improvement; and
- 7.1.1.4. Inform peers of their right to address any concerns the peers might have with the Peer Leader to PWA staff and/or other Peer Leaders.

- 7.1.2. Peer Leaders will be accountable to PWA and other Peer Leaders by:

- 7.1.2.1. Attending and participating in Peer Leader Initiative Group meetings and attending one-on-one supervision meetings with PWA staff;
- 7.1.2.2. Reporting to the Peer Leader Initiative Group on a monthly basis the progress of their program; and
- 7.1.2.3. Managing funds judiciously by a) keeping records of statistics and expenditures, b) reporting such statistics and expenditures on a monthly basis, and c) following standard PWA finance procedures.

- 7.1.3. Other responsibilities of Peer Leaders include:

- 7.1.3.1. Commitment to at least 1 year in the program from the time their program is implemented;
- 7.1.3.2. Fulfilling all program responsibilities as negotiated with and approved by PWA;
- 7.1.3.3. Adhering to the Peer Leaders' Statement of Identity and Values; and
- 7.1.3.4. Ensuring a person or persons are available to provide back-up in leading your peer-led program if you become sick and cannot participate in some other way (by telephone, etc.).
- 7.1.3.5. Calling one another with meeting reminders – the duty to make the calls for the upcoming meeting will fall on the person who has just chaired the last meeting.

## 7.2. PWA

### 7.2.1. PWA will be accountable to Peer Leaders by:

- 7.2.1.1. Providing updates to Peer Leaders on program expenses and grant applications, except for staff salaries and any other confidential issues between PWA and any one Peer Leader;
- 7.2.1.2. Seeking funding to provide not only program funding but also honoraria to Peer Leaders;
- 7.2.1.3. Processing payments in a timely manner;
- 7.2.1.4. Coordinating, attending and participating in Peer Leader Initiative Group meetings;
- 7.2.1.5. Being available to meet with Peer Leaders on a one-on-one basis to discuss program concerns or issues, and to provide developmental feedback; and
- 7.2.1.6. Meaningfully acknowledging Peer Leader contributions to the program, and recording those contributions for posterity.

### 7.2.2. Other responsibilities of PWA include:

- 7.2.2.1. Screening and selecting new Peer Leaders, in consultation with the Peer Leader Initiative Group.
- 7.2.2.2. Negotiating with and approving program details on a one-on-one basis with each Peer Leader
- 7.2.2.3. Receiving, investigating and resolving complaints
- 7.2.2.4. Dismissing Peer Leaders, when necessary
- 7.2.2.5. Providing training opportunities, when possible
- 7.2.2.6. Advertising any "open spaces" in the Peer Leaders program
- 7.2.2.7. Coordinating and attending a monthly one-on-one supervision meeting with each Peer Leader.
- 7.2.2.8. Annually initiate a review of the Terms of Reference.

### 7.2.3. PWA Commitments to the Program include:

- 7.2.3.1. Without any outside funding, providing space for peer-led programs, and within the capacity of the existing budget, to advertise the program.
- 7.2.3.2. With special funding for the Peer Leaders program, providing an honorarium to Peer Leaders, and providing modest program support money for supplies, refreshments, transportation, and any other accommodations consistent with PWA's accessibility policies;
- 7.2.3.3. supporting Peer-led programs for at least three (3) years from the time of their implementation (ie - excluding their development time). However, PWA reserves the right to, at any time, make the program part of regularly staffed services. If that happens, Peer Leaders would be given an opportunity to apply for another full 3-year term. If the integration of a program into regular PWA services entails the posting of a new position, PWA cannot guarantee the Peer Leader will be hired for that position. However, PWA will consider Peer Leader experience and OAN Leadership Program or equivalent training as valid experience and training if the position is posted externally and a Peer Leader applies for the position.
- 7.2.3.4. If PWA integrates a Peer-led program into its regular programming, and if a staff position is created, and the Peer-Leader is not hired for that position, PWA will

make every effort to include the Peer Leader into an advisory committee for the newly integrated program.

- 7.2.3.5. After a Peer Leader steps down from their leading a program, the program may be continued (with another Peer Leader), expanded, discontinued, be disassociated from PWA, or integrated into regular PWA programming.

## 8. Peer Leader Initiative Group Meetings

- 8.1. Peer Leader Initiative Groups would meet monthly.
- 8.2. There may be more than one group, depending on the number of Peer Leaders and depending on PWA staff availability.
- 8.3. The purpose of the meetings would be to:
- 8.3.1. Share progress and submit any written reports, financial or otherwise;
  - 8.3.2. Provide mutual support and input;
  - 8.3.3. Improve skills;
  - 8.3.4. Consider new Peer Leader proposals; and
  - 8.3.5. Discuss or plan any changes or adjustments to the program
- 8.4. Decisions taken will, where possible, follow a consensus decision-making process.
- 8.5. Groups will consist of a) all Peer Leaders, b) a selection of Peer Mentors (former Peer Leaders or others with relevant experience), and c) PWA staff.
- 8.6. There will be an opportunity for the chair to be rotated.
- 8.7. An additional group meeting may be held once or twice a year specifically for debriefing and peer support purposes.

## 9. Complaints - Processes and Possible Outcomes

- 9.1. PWA would review any confidential evaluation/feedback forms and monitor the Peer Leader's progress on an ongoing basis;
- 9.2. PWA staff would have the authority to remove a Peer Leader if he or she violated one of the criteria in Section 7. In most cases, a resolution would be attempted. The exceptions to this would be in the case of theft and some other very serious offences, where the Peer Leader would automatically be dismissed;
- 9.3. The process for resolving complaints would be: PWA would receive any complaints from peers participating in a Peer Leader's program, inform the Peer Leader of the complaint, and, work out a plan together to resolve the complaint.

- 9.4. If a Peer Leader is not satisfied with the resolution and feel unfairly treated by PWA staff, he or she may follow PWA's regular complaints process.
- 9.5. Depending on the circumstances, it may not be possible for PWA staff to share the reason for dismissal of a Peer Leader with other Peer Leaders.

## 10. Ending the relationship between a Peer Leader and PWA, or a Peer Leader Program and PWA

- 10.1. Peer Leaders can resign from the program at any time but are asked to make a 1-year commitment from the time their program is implemented.
- 10.2. Three years is the maximum term that a Peer Leader can lead any one particular Peer-Leader program. If after that time, the Peer Leader has another idea he or she wishes to present to the program, he or she may re-apply.
- 10.3. Former Peer Leaders may act as mentors in the program.
- 10.4. Peer Leaders may at any time choose to sever the relationship between the program and PWA. If they do so, they will operate their groups or programs without the assistance of PWA, will not have access to PWA resources (financial or otherwise), and will not be able to use PWA's name in association with the group (regarding using PWA's name with respect to documents, see the section on Intellectual Property). PWA would also reserve the right to incorporate a similar service into its regular services.
- 10.5. If PWA and a Peer Leader are parting ways because the Peer Leader wishes to run the group outside of PWA, both parties will commit to having a conversation to avoid a) the program being in competition with PWA services or vice versa, or b) any negative communications or community perception.
- 10.6. A Peer Leader might be removed from his/her group or his/her group might be asked to dissociate itself from PWA in the following circumstances (attempts will be made to resolve the situation in most cases as soon as a problem is identified):
  - 10.6.1. There are complaints from peers that cannot be resolved;
  - 10.6.2. There is evidence of financial mismanagement or theft;
  - 10.6.3. The Peer Leader violates PWA's anti-harassment/ anti-discrimination policy;
  - 10.6.4. The Peer Leader is absent from a meeting or event of his/her program without explanation, without making plans for his/her temporary replacement, or if he/she misses more than three meetings or events in his /her program;
  - 10.6.5. The Peer Leader breaches confidentiality; and
  - 10.6.6. The Peer Leader is absent from Peer Leader Initiative Group meetings more than once without a valid reason.

## 11. Managing Conflicts of Interest

- 11.1. A conflict of interest arises when a person is in a situation or faces a decision, by virtue of his position, to benefit from that position in a manner not intended by the conditions of the office. Conflicts of interest can be managed by stating the conflict and absenting oneself from a decision, refusing to comment or disclose information that would create a conflict, or by removing oneself from the situation that is creating the conflict.
- 11.2. Potential for conflicts of interest exist in this Peer Leaders model. Peer Leaders will occupy a space in the organization that is somewhere between volunteers and paid staff. As such, they may face situations where they may receive privileged information that may benefit them, may gain preferential access to services (for example, gaining access to extra food from the food bank), or may be making decisions that will benefit them financially.
- 11.3. Peer Leaders will maintain transparency and manage their conflicts of interest by:
- 11.3.1. Avoiding conflicts wherever possible;
  - 11.3.2. Declaring conflicts to PWA and/or to the Peer Leaders Initiative Group whenever they arise; and
  - 11.3.3. Quickly resolving the conflicts if it is identified or discovered after the fact. This resolution will depend on the situation and may be either by a) removing yourself from the decision-making role, b) removing oneself from the discussion, c) returning the benefit, or d) another mutually-agreed upon remedy.
- 11.4. PWA will manage Peer Leaders' conflicts of interest by:
- 11.4.1. Identifying any situations where Peer Leaders may be in conflicts of interest;
  - 11.4.2. Taking steps to familiarize Peer Leaders with the potential for conflicts of interest, and to minimize placing Peer Leaders in situations of conflict;
  - 11.4.3. Helping Peer Leaders to resolve conflicts.

## 12. Intellectual Property

- 12.1. Materials developed by Peer Leaders, either prior to or during the Peer Leader's involvement in the program, are co-owned by the Peer Leader and PWA (unless previously copyrighted) as soon as they are used in the Peer Leaders Program.
- 12.2. Materials cannot be used independently by PWA or by Peer Leaders without acknowledging the other party's contribution. This will be done by using a statement that the other party contributed "to a previous version of this document."

**Terms of Reference Approved:**  
**To be reviewed/revisted:**

**XXXX, 2009**  
**at the end of each fiscal year**

## Section 2

# Peer Facilitator Skills Training Resources: Supporting an Ongoing Adult Learning Process

These worksheets will support Peer Facilitators through three distinct stages (**Steps**) of their skill development and learning. To support agencies in developing local training programs for Steps 1 and 2, there are extensive written materials, worksheets and exercises available for download from [www.abrpo.org](http://www.abrpo.org), identified as PHA Facilitator Skills Parts A & B. The materials below support adult learning by creating a participant-driven process with practical skills application:

**STEP 1: Preparation - Facilitator Skills and Group Dynamics (Part A)**

Peer Learning Contract

**STEP 2: Presence - Self-awareness and the Emotional Dimension (Part B)**

Practicum Planning

Practicum Planning: Completed Example

Practicum Supervision Planning: Comparing Learning and Facilitation Styles

**STEP 3: Practice - Peer Learning (incorporated into Workbook)**

Practicum Development Form

Practicum Development Form: Completed Example

Peer Facilitator Competencies - An Assessment Worksheet

Peer Facilitator Competencies: Completed Example

Practicum Report

Practicum Report: Completed Example





# Peer Facilitator Training Learning Contract

**As a participant in the Peer Facilitator Training, I will:**

- Participate in all component of the training events, as below.
- Read the complete Training Manual prior to Part B.
- Uphold the Code of Conduct in my actions.
- Complete all assessment and evaluation forms.
- Seek out support for all aspects of my learning process.
- Work to fulfill my learning objectives which are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**( ) If for any reason I cannot attend events, I will call or send an email.**

**( ) I will hold myself accountable for the Completion of my practicum.**

Dates	Event	Location

**I, \_\_\_\_\_, commit to the above tasks on this day.**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Practicum Planning: Connecting My Learning Goals with Activities**

My personal learning contract goals are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Focus areas for improvement based on my self-assessment are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Activities I am considering for my practicum are:

- \_\_\_\_\_
- \_\_\_\_\_

### **Practicum Planning: Connecting My Learning Goals with Activities – Completed Example**

**My personal learning contract goals are:**

- How to respond to my emotions and emotions of others
- How to un-bracket and bracket my emotions effectively and appropriately
- Clarifying boundaries and different roles
- Group dynamics and conflict resolution

**Focus areas for improvement based on my self-assessment are:**

- Responding to my own emotions
- Bracketing and un-bracketing of emotions
- Group dynamics, responding and clearing conflicts
- Effective problem-solving techniques

**Activities I am considering for my practicum are:**

- Develop a training session for peers to use skills from Part B of the manual

**Practicum Supervision Planning: Comparing Learning and Facilitation Styles**

My personal learning style is: \_\_\_\_\_ My personal facilitation style is: \_\_\_\_\_

This means that I:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

\_\_\_\_\_’s learning style is: \_\_\_\_\_ . \_\_\_\_\_’s facilitation style is: \_\_\_\_\_

This means that he/she:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

(\* NOTE: Please see Part A Training Manual Appendix I & II for Learning Styles and Facilitation Style questionnaires)

**Practicum Supervision Planning: Strengths and Challenges**

The strengths from our learning and facilitation styles are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

The challenges to include from other learning and facilitation styles are:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## Practicum Development Form

<b>Task</b>	<b><i>Describe your event</i></b>	<b>Who's Responsible + By When</b>
<b>1) Title of Event:</b>		
<b>2) Objective(s) of Event:</b> <ul style="list-style-type: none"> <li>a) Be specific, ie. To educate about..., To provide peer-to support for...</li> <li>b) Develop and get feedback on a detailed agenda.</li> </ul>		
<b>3) Time and Length:</b> <ul style="list-style-type: none"> <li>a) Day, Evening of Weekend?</li> <li>b) How much time for events</li> </ul>		
<b>4) Target Audience:</b> <ul style="list-style-type: none"> <li>a) Who is it?</li> <li>b) What are the ways to reach the participants you want to attend?</li> </ul>		

<p><b>5) Meeting with supervisor:</b></p> <ul style="list-style-type: none"> <li>a) How many planning meetings are needed?</li> <li>b) Will supervisor attend event to fill out Assessment for or someone else?</li> <li>c) When will the debriefing meeting happen?</li> </ul>		
<p><b>6) Logistics/ Getting Organized:</b> Who will coordinate:</p> <ul style="list-style-type: none"> <li>a) Refreshments?</li> <li>b) Space for the meeting?</li> <li>c) Printed documents to be handed out?</li> <li>d) What type of materials needed or A/V equipment?</li> </ul>		
<p><b>7) Will the ASO be providing any of these things:</b></p> <ul style="list-style-type: none"> <li>a) Childcare?</li> <li>b) Tokens?</li> </ul>		

<p><b>7) Will the ASO be providing any of these things:</b></p> <ul style="list-style-type: none"> <li>a) Childcare?</li> <li>b) Tokens?</li> <li>c) Money for a meal?</li> </ul>		
<p><b>8) Evaluation Forms:</b></p> <ul style="list-style-type: none"> <li>a) Who develops it?</li> <li>b) Who types up summary for Report?</li> </ul>		
<p><b>9) Anything else needed:</b></p>		

## Practicum Development Form: Completed Example

<b>Task</b>	<b><i>Describe your event</i></b>	<b>Who's Responsible + By When</b>
<b>1) Title of Event:</b>	CARE: Competencies in Awareness, Respect & Empathy Training	1) Community of Practice Team and CARE volunteer team- Jan' 10 to June'10 development of program  2) Co-facilitators create curriculum Jul & Aug'10  3) Sept'10 -present-delivery of training
<b>2) Objective(s) of Event:</b> a) Be specific, ie. To educate about..., To provide peer-to support for...  b) Develop and get feedback on a detailed agenda.	1) Client Service Training-to give participants skills in both internal and external awareness, respect within which you hold yourself and others and having empathy for oneself and others.  2) PWA- who we are and what we do  3) Being Assertive (vs. unassertive or aggressive)  4) Boundaries as a volunteer service provider  5) Dealing with Difficult People  6) Trusting Behaviours  7) Conversational Etiquette  8) Service Mentality	

<p><b>3) Time and Length:</b></p> <p>a) Day, Evening of Weekend?</p> <p>b) How much time for events</p>	<p>2 full-day training</p> <p>This has been offered 9 times in 3 different formats: Sat &amp; Sun, two days back to back during the week and then the same day a week apart e.g 2 Tuesday's in a row.</p>	
<p><b>4) Target Audience:</b></p> <p>a) Who is it?</p> <p>b) What are the ways to reach the participants you want to attend?</p> <p>..</p>	<p>This started as a required training for all Front Desk volunteers at PWA. Once Front Desk volunteers started taking the training, other volunteers had heard such great things they started asking for it. Then the training became required for all PWA volunteers who said that it also made sense their respective Program Coordinators also take the training which has since become required for all PWA staff and volunteers</p>	
<p><b>5) Meeting with supervisor:</b></p> <p>a) How many planning meetings are needed?</p> <p>b) Will supervisor attend event to fill out Assessment form, or someone else?</p> <p>c) When will the debriefing meeting happen?</p>	<p>The program was first conceptualized in Jan,2010 and a Community of Practice Committee struck to oversee the project. A committee of Front Desk volunteers called the CARE committee was struck to guide and consult on the project.</p> <p>Over a six month period(Jan-June) the CARE program was developed and over the last 2 months 9July-Aug). The 2 Co-facilitators for the training created the curriculum</p>	<p>a) Multiple meetings occurred with the Director of Programs &amp; Services, Community of Practice Team, CARE Team and the Co-facilitator team.</p> <p>b) Manager the 7th offering of the training of July 6 &amp; 13 to evaluate the Peer Facilitator.</p> <p>c) We have also had a number of debriefing</p>

<p><b>6) Logistics/ Getting Organized:</b></p> <p>Who will coordinate:</p> <p>a) Refreshments?</p> <p>b) Space for the meeting?</p> <p>c) Printed documents to be handed out?</p> <p>d) What type of materials needed or A/V equipment?</p>	<ol style="list-style-type: none"> <li>1. Reserve Meeting Space</li> <li>2. Reserve laptop &amp; projector <ul style="list-style-type: none"> <li>• Obtain speakers from server room day of training</li> </ul> </li> <li>3. Administer the Sign-up sheet</li> <li>4. Attendance sheet (update from sign-up sheet &amp; print)</li> <li>5. Binder <ul style="list-style-type: none"> <li>• Binder Cover (update &amp; print)</li> <li>• Table of contents (print) <ul style="list-style-type: none"> <li>○ 1-10 tabs</li> <li>○ Sheet protectors (for certificate)</li> <li>○ Workbook</li> <li>○ Cue cards (order from Staples copy centre)</li> </ul> </li> </ul> </li> <li>6. Pens, Highlighters and Nametags and pouches</li> <li>7. Certificate of completion (from Sign-up sheet)</li> <li>8. Print resources: <ul style="list-style-type: none"> <li>• Evaluation</li> <li>• Structured Feedback instructions</li> <li>• Structured Feedback forms</li> <li>• One Step at a Time</li> <li>• Training agreement</li> <li>• I have AIDS</li> <li>• CARE Overview</li> <li>• C ARE principles</li> <li>• PWA Who we are</li> <li>• All content modules</li> </ul> </li> <li>9. Collages <ul style="list-style-type: none"> <li>• Bristol board (cut in half)</li> <li>• Newspapers and magazines</li> <li>• Arts and crafts supplies</li> </ul> </li> <li>10. Continental Breakfast (detailed menu provided)</li> <li>11. Afternoon snacks (detailed menu provided)</li> <li>12. Order Lunch (detailed menu provided)</li> </ol>	
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<p><b>7) Will the ASO be providing any of these things:</b></p> <ul style="list-style-type: none"> <li>a) Childcare?</li> <li>b) Tokens?</li> <li>c) Money for a meal?</li> </ul>	<p>Agency covered the costs of all the meals and the materials.</p>	
<p><b>8) Evaluation Forms:</b></p> <ul style="list-style-type: none"> <li>a) Who develops it?</li> <li>b) Who types up summary for Report?</li> </ul>	<p>We introduced Structured Feedback to the participants, then during each session we asked for it at lunch and at end of day. We had an overall of the 2-day training. Complete copies of have been typed.</p>	
<p><b>9) Anything else needed:</b></p>		

## Facilitator Training

# Facilitator Competencies Assessment Worksheet

**Name of person being assessed:** \_\_\_\_\_

**Assessed by:** \_\_\_\_\_

**Relationship to the Community Facilitator:** \_\_\_\_\_

**Date of Assessment:** \_\_\_\_\_

**Context of the Assessment:** \_\_\_\_\_

\_\_\_\_\_

Facilitator Competency	Strengths	Learning Needs
<i>I. Self/ Presence</i>		
Demonstrates an understanding of <i>Self</i> as key instrument in facilitation process		
Character and Style appropriate to role in community		
Holds and embodies solid Ethics and Values, consistent with the 5 Tasks of Leadership		
Clear Boundaries and Role Clarity		
Demonstrates reliable Self-care		

**Comments:**

Facilitator Competency	Strengths	Learning Needs
<i>II. Engaging with Others</i>		
Effective communication skills, rapport, active listening and empathy		
Creates positive atmosphere; encourages respect for experience and diversity of people		
Able to give and receive feedback effectively		
Understands and adapts to differences in adult learning styles and needs		
Can deal sensitively and appropriately with diversity in group settings		

**Comments:**

<b>Facilitator Competency</b>	<b>Strengths</b>	<b>Learning Needs</b>
<i>III. Role of Facilitator</i>		
Understands learning styles and participants needs		
Can use learning approaches that best fit the group		
Able to enliven and engage participants, awaken group energy and encourage creative thinking.		
Practical skills: Plan effective use of time, space, visuals and equipment. Can keep records if appropriate		
Process skills: Create and use facilitation procedures to engage the group in their task at various stages of group development		

Facilitator Competency	Strengths	Learning Needs
<i>III. Role of Facilitator</i>		
Works effectively with a Team; Demonstrates team values and co-facilitation skills		
Problem-solving skills: can deal effectively with tensions and problems in the group		
Able to support the group in evaluating its process and activities		
Skills in debriefing, accessing supports, ongoing learning		

**Comments:**

Facilitator Competency	Strengths	Learning Needs
<i>IV Leadership in Community</i>		
Develops an Action Plan for practice and practicum opportunities		
Engaged organizations and community members in creating peer facilitation opportunities		
Effectively strategizes around challenges		
Creates a process for reflecting and making meaning of facilitation/community engagement experiences and opportunities		

**Comments:**

## **Peer Facilitator Competencies: Assessment Worksheet**

### **Completed Example**

The following provides sample content for constructive feedback provided to a Peer Facilitator to support learning about areas of strength and areas where skill development is recommended.

#### ***I. Self/Presence***

##### **Demonstrates an understanding of *Self* as key instrument in facilitation process**

*Strengths* – Facilitator was able to use lived experiences relevant to the topic. (ex. A personal difficult disclosure of HIV-status)

*Learning Needs* – To continue to develop a greater comfort level with sharing personal achievements as narrative to enhance presentation. (ex. Able to identify when sharing parts of their lived experience is appropriate)

##### **Character and Style appropriate to role in community**

*Strengths* – Facilitator presented as a welcoming, calm speaker with respectful boundaries and interactions with participants.

*Learning Needs* – To continue to gain a clearer understanding of the complex, interacting parts of community (ex. when “an insulting comment was made about another community member” ; ex. The impact of power imbalances)

##### **Holds and embodies solid Ethics and Values, consistent with the 5 Tasks of Leadership**

*(model the way, inspire a shared vision, challenge the process, encourage the heart, enable others to act)*

*Strengths* – Facilitator was encouraging of participants in respectful ways (tone, eye contact). Facilitator modelled appropriate use of plain language to clarify a complex topic. Facilitator identified ways that the topic challenged current organizational processes (ex. Inclusion of peers). Facilitator modelled a respectful understanding of community and how the topic impacts this community.

*Learning Needs* – Facilitator can further develop their vision of changes and gain comfort in sharing their milestones. Facilitator can develop way to have interactive exercises that will encourage participants to explore ways to take action

### **Clear Boundaries and Role Clarity**

*Strengths* – Facilitator showed good boundaries by making referrals instead of giving advice when asked for support. Facilitator reviewed group guidelines and reminded participants of the guidelines when appropriate. Facilitator clarified their role when questioned by participants.

*Learning Needs*–Facilitator may want to review organizational guidelines as a way of preparing prior to presenting at different organizations/institutions. Facilitator may want to seek guidance from the partnering organization when issues of unclear boundaries arise.

### **Demonstrates reliable Self-Care**

*Strengths* – Facilitator was able to identify which elements of presenting they were most comfortable with and asked for support with the areas with which they were less comfortable. During the de-brief, the facilitator un-packed their emotional triggers that they had 'bracketed' during the session. Facilitator used scheduled breaks to take time to 'ground' themselves.

*Learning Needs*–Facilitator needs to continue to seek support for co-facilitator during de-briefings, when emotionally triggered.

## ***II. Engaging with Others***

### **Effective communication skills, rapport, active listening and empathy**

*Strengths* – Facilitator had good volume and tone when presenting. Facilitator asked open questions to encourage participants. Facilitator made good reflections to demonstrate that participants were being heard. Facilitator demonstrated empathy, caring and compassion through their relaxed, inviting body posture.

*Learning Needs* – To practice changing closed questions into open questions when trying to get participants to share more of their story.

### **Creates positive atmosphere; encourages respect for experience and diversity of people**

*Strengths* – Facilitator modelled respectful, inclusive language during interactive group exercises. The facilitator used plain language that was respectful for all participants.

*Learning Needs* – Facilitator may want to review how the impact of multiple stigmas is accumulative.

### **Able to give and receive feedback effectively**

*Strengths* – Facilitator provided relevant, positive feed-back to co-facilitator. Facilitator received feed-back from co-facilitator and added the suggested changes to their presentation style.

*Learning Needs* – Facilitator needs to continue to take time for de-briefing immediately after events.

### **Understands and adapts to differences in adult learning styles and needs**

*(Activists: feel/do; Reflectors: feel/watch; Theorists: think/watch; and Pragmatists: think/do)*

*Strengths* – Facilitator had various active elements in presentation and workshop exercises that encouraged different styles for Pragmatist and Activists (both styles are Doers). There were elements of both Thinking and Feeling.

*Learning Needs* – Facilitator may want to add elements that give space for Theorists and Reflectors (the Watchers)

### **Can deal sensitively and appropriately with diversity in group settings**

*Strengths* – Facilitator showed culturally appropriate language and respect for all participants.

*Learning Needs* – Facilitator may want to develop more skills to help intervene between participants with conflicting beliefs.

## ***III. Role of Facilitator***

### **Understands learning styles and participants needs**

*Strengths* – Facilitator did well at including Watching elements with their power-point presentation and Doing exercises with Role-Playing.

*Learning Needs* – Facilitator may want to develop various responses to help Activists and Reflectors to better manage the strong Feelings that these styles present.

### **Can use learning approaches that best fit the group**

*Strengths* – Facilitator was able to modify their long power-point presentation in response to the number of Activists in the room.

*Learning Needs* – To continue to begin with check-ins that include open questions that give insight into people's learning styles

### **Able to enliven and engage participants, awaken group energy and encourage creative thinking**

*Strengths* – Facilitator was able to reflect how the topic impacted participants in personal ways.

*Learning Needs* – Facilitator needs to take continuous scans of the room and help co-facilitator identify moments where presentation is lagging.

**Practical Skills: Plan effective use of time, space, visuals and equipment. Can keep records if appropriate**

*Strengths* – Facilitator used their Practicum Planning worksheets effectively and referred to them for clarification. Facilitator had an agenda hand-out for participants. Facilitator used 'structured feed-back' forms to collect participant feed-back. Facilitator kept notes on ways to improve their facilitation.

*Learning Needs* – To continue to be ready to adapt to the unexpected. To have a back-up plan if technological difficulties arise.

**Process Skills: Create and use facilitation procedures to engage the group in their task at various stages of group development**

*(Forming, Norming, Storming, Performing and Transforming)*

*Strengths* – Facilitator provided an ice-breaker to begin with Forming the group. Facilitator was able to adapt to the participants at various stages of Norming and Storming and encouraged them when they reached a stage of Performing.

*Learning Needs* – Facilitator may want to review elements of Closure to better design the ending of the groups (Transforming)

**Works effectively with a Team; Demonstrates team values and co-facilitation skills**

*Strengths* – Treated team with respect and requested support appropriately. Facilitator developed guidelines and agenda with input from all of their planning team.

*Learning Needs* – To learn to seek support sooner when struggling and to better encourage skills of their co-facilitator.

**Problem-solving skills : can deal effectively with tensions and problems in the group**

*Strengths* – Facilitator was able to reflect and manage intense emotional opinions of participants in a respectful way.

*Learning Needs* – To maintain neutrality when expressing sensitive topics to a diverse group (ex. Not all participants may disagree with disclosure laws)

**Able to support the group in evaluating its process and activities**

*Strengths* – Facilitator included feed-back forms for all parts of the presentation and discussed the forms during de-briefs.

*Learning Needs* – Continue to seek feed-back and reflect their learning to participants when appropriate. (ex. We are going to pick up the pace at the request of the group from earlier)

**Skills in debriefing, accessing supports, ongoing learning**

*Strengths* – Facilitator included de-briefing sessions with team and developed potential support list of referrals for participants.

*Learning Needs* – Facilitator may want to expand learning around Harm Reduction issues.

***IV. Leadership in Community*****Develops an Action Plan for practice and practicum opportunities**

*Strengths* – Facilitator developed and delivered the current event using 'lived experience' as well as input from their organization and the community. Facilitator has identified allies for future event planning.

*Learning Needs* – To strengthen ties with their organization and discuss further facilitation opportunities.

**Engaged organizations and community members in creating peer facilitation opportunities**

*Strengths* – Facilitator worked collaboratively with community, organization and peers to demonstrate the impact peers bring to the topic.

*Learning Needs* – To use patient problem-solving, response focused strategies when engaging organizational structures unaccustomed to working in a peer model.

**Effectively strategizes around challenges**

*Strengths* – Facilitator was able to negotiate more organizational support without funding or additional costs to organization by finding a free venue to accommodate the event.

*Learning Needs* – To identify possible reasons for low participant participation.

**Creates a process for reflecting and making meaning of facilitation/community engagement experiences and opportunities**

*Strengths* – Facilitator developed a report that summarized the event, to be delivered to organization and interested community members.

*Learning Needs* – To develop next steps for further presentations.

## Practicum Report

1. Name: \_\_\_\_\_
2. Title of event: \_\_\_\_\_
3. Type of event & date: \_\_\_\_\_
4. Length of event: \_\_\_\_\_
5. Number of participants: \_\_\_\_\_
6. Description of event:  
\* please attach a copy of any posters, agenda, handouts  
  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. Summary of evaluations:  
  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. PHA Peer Facilitator Training Competencies and Assessment form completed? \_\_\_\_\_
9. Signature of practicum supervisor: \_\_\_\_\_
10. Learning Objectives Evaluation: please complete the table on the following page by referring back to your Learning Contract and re-copying each item and responding to the questions. Feel free to use more space if needed.

<b>My Learning Objectives</b>	<b>Did I accomplish this objective? If yes, How/What specific actions? If no, explanation. Any future plans?</b>

## Practicum Report: Completed Example

1. Name: Year Two trainee
2. Title of event: CARE: Competencies in Awareness, Respect & Empathy
3. Type of event & date: Trainings (#9) thus far; this one July 6-13
4. Length of event: 14 hrs
5. Number of participants: 9 (81 total)
6. Description of event:  
\* please attach a copy of any posters, agenda, handouts

Two-day training summary: What is CARE?; Presentation on PWA; modules on Trust, Assertive Behaviour, Volunteer Boundaries, Dealing with Difficult people, Conversational Etiquette and the service mentality.

7. Summary of evaluations:

In the initial stages we acted on the structured feed to make changes to the process. This 7<sup>th</sup> time we offered this training, we have seen overwhelmingly positive feedback and impacts on participants.

8. PHA Peer Facilitator Training Competencies and Assessment form completed and submitted to Claudette Samuels.

9. Signature of practicum supervisor: \_\_\_\_\_

10. Learning Objectives Evaluation: Please complete the table on the following page by referring back to your Learning Contract, re-copying each item and responding to the questions. Feel free to use more space if needed.

<b>My Learning Objectives</b>	<b>Did I accomplish this objective? If yes, How/What specific actions? If no, explanation. Any future plans?</b>
Learn to become a watcher feeler	This is a work in progress and over the past year of doing this my co-facilitator Ed Ago has seen a shift
Effectively indentifying and dealing with difficult situations	We had a number of situations to work through during the training. I`m also registered for a Conflict Resolution Accredited training at the Canadian Training Institute.
Effectively bracket my internal voice; so I am on effective listener	This is also a work in progress and over the year have gained a lot of skill as I identified in my mentors evaluation



## Section 3

### Measured Success in Pilot Project, 2009-2012

The following materials outline research findings from this project. They document major areas of investigation into effective training techniques and monitor progress in overall project implementation.

1. Participant Feedback on Successful Adult Learning Techniques Utilized in PHA Facilitator Training Series (*OHTN oral presentation 2011*)
2. 'Turning to One Another': Evidence and experience demonstrating greater involvement of PHAs in support services and leadership in Ontario's community-based AIDS Service Organizations (*OHTN oral presentation 2011*)
3. Essential Elements of Successful Adult Learning Techniques Utilized in PHA Facilitator Training: Learning Styles, Leadership and Dialog in a Safe Environment (*CAHR Poster 2012*)
4. Need for Organizational Tools and Processes Identified through Participants in Turning to One Another PHA Engagement Project in Ontario (*CAHR Poster 2012*)





# 1. Participant Feedback on Successful Adult Learning Techniques Utilized in PHA Facilitator Training Series

## PHA Capacity-building to Increase Community Engagement

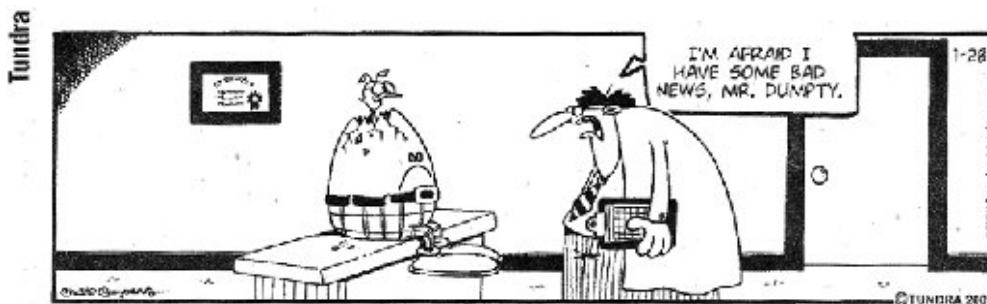
### Overall Objective:

- To increase community engagement by building PHA skills.

### Project Background:

- A three-year collaborative pilot project connected to Turning to One Another connect for people living with HIV/AIDS (PHAs) and frontline staff from community-based AIDS Service Organizations (ASOs) in Ontario.
- 10-days of group training for approx. 20 PHAs from across Ontario
- Evaluation of Part A, B and C Summary conducted at completion of Part C

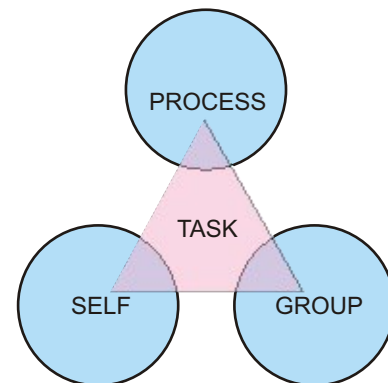
## Training Model Supporting Personal Shifts in Identity



### PHA Facilitator Training series includes:

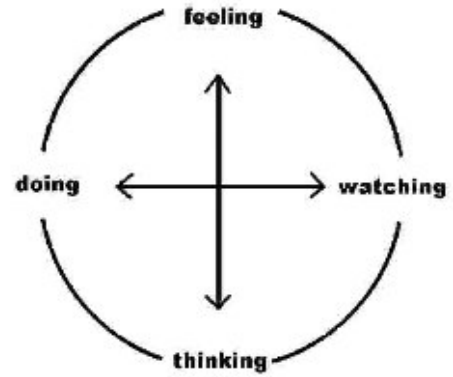
- **PART A: Preparation**  
Group Stages and Group Development- Engaging the Theory
- **PART B: Presence**  
Self-awareness as an instrument to support group capacity: Working with Emotional Dimension
- **PART C: Practice**  
Peer Learning; Consulting; Mentoring; Meeting the Challenges of a Peer Facilitator

### Adult Education Learning Techniques and Tools Employed



**Components of Training Design:**

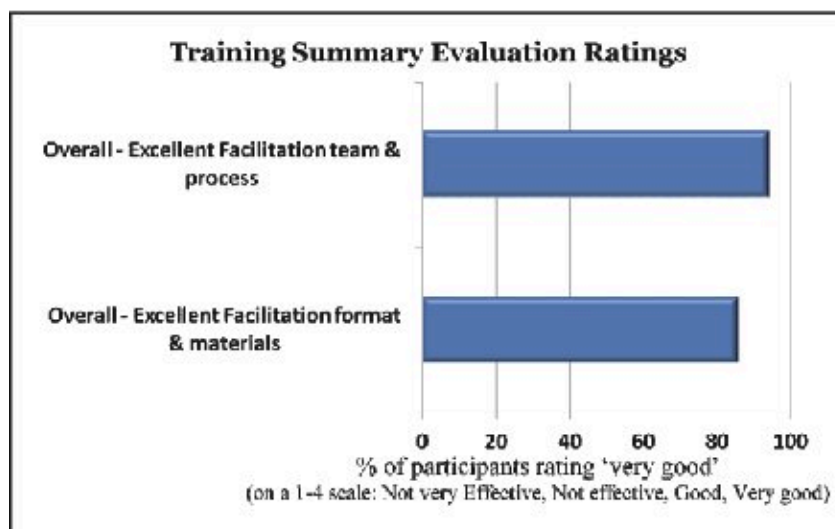
- Co-created container: Group Agreements
- Comprehensive training manual, 200+ pages
- Diversity in learning styles
- Holistic tools to include body awareness
- Intensified experiential work in small groups 'pods', peer feedback
- Facilitation team transparently applies theory to group needs, a.k.a 'Respond in the moment'
- Reflection and Debriefing



*Nearly all participants report achieving learning objective:*



*Approximately 8/10 participants rate training as 'very good':*



**Content and Structure of Learning:****Adult Education Group Process:****PHA Facilitator Training Qualitative Data****Part A - Learning**

Quote from participants:

- “I have learned to focus, speak up and be myself.”
- “Learning how I affect/impact a group and to separate my issues from that of the group.”
- “Learned how to follow a process, not just going ahead with the task”

**Part B - Working with Emotional Dimension:**

- “How to read emotions from participants and using the I statement”
- “Importance of emotional connections and harnessing the power”
- “Being present in the emotion and sharing the truth with the person(s)”
- “How to control my emotion and be real”
- “Emotions are better handled by working through, not avoided”

**Part C - Expanding out into Community:**

- “To step outside of my comfort zone and take risks to work within a team.”
- “I have become self-confident and feel I can pursue my dream.”
- “Practical language to communicate with my ASO, peers, community partners for the capacity building needs for PHAs and MIPA programming.”

**Challenges Identified: Complexity of Emotional Dimension**

Some participants’ responses illustrate apprehension and concern -

**A: Personal capacity to manage the emotional dimensions of the training**

- “confronting fears in a public space in such a short time, would like it to take longer”
- “I’m hoping that my leaving is not interpreted as disrespect”
- [Concerned about capacity to]: “come with an open, mind, body, spirit, trust and respect for the process”; “Take care of myself with self-care”
- “I wish that next time I would of-can express really my feeling”

**B: Future engagement in community-based facilitation**

- [Concerned about capacity to]: “learn how to read and tune into people”; “effectively facilitate”;
- “Preparation for vacuum in “real” world”
- “I must acknowledge now that while I can assimilate the material in this chapter, I will remain unequipped to actually leave this training able to functionally facilitate a group. However, in time once I can work though my emotional weakness, I’ll find the balance to do this type of work in a complete way.”

**Limitations:**

- Response Rate was 100% (n=19), but not all people answered each question
- Creating a 'Response bias'
- Post-training survey not conducted, so integration of learning over time not tracked.

## 2. 'Turning to One Another': Evidence and experience demonstrating greater involvement of PHAs in support services and leadership in Ontario's community-based AIDS Service Organizations

### Turning to One Another: ASO Workers and PHAs Bringing GIPA to Life

#### *Overall Objective:*

- To increase knowledge among ASO workers of best practices for collaborative engagement of PHAs in ASOs and in HIV/AIDS-related service delivery in their communities.

### Background

Walking the talk of GIPA/MIPA

*“GIPA seeks to ensure that People Living with HIV are equal partners and breaks down simplistic (and false) assumptions of “service providers” (as those living without HIV) and “service receivers” (as those living with HIV).”*

(p.1) UNAIDS Policy Brief The Greater Involvement of People Living with HIV (GIPA). 2007.

Following up on Living & Serving through: Documenting Learning & Organizational Development:

- *“#6 We recommend that more AIDS organizations publish profiles of best practices around PHA involvement as well as individual profiles of different PHA roles in the movement.”*  
(p. 9 & 10), Living & Serving II: 10 Years Later. 2007. Ontario HIV Treatment Network.
- *“#11 We recommend that all AIDS organizations develop specific volunteer policies that encourage the recruitment and retention of PHA volunteers.”*
- *“#12 ...identify existing templates that promote best volunteer practices and, in their absence, develop new templates to aid organizations.”*  
Living & Serving II: 10 Years Later. 2007. Ontario HIV Treatment Network.

TTOA Project Outline:

- A three-year collaborative pilot project to develop best practices in GIPA implementation through: supporting over 50 trained PHA facilitators and almost 20 social support staff to build new relationships and expanded roles within 13 community-based AIDS Service Organizations (ASOs) in Ontario.
- Activities:
  1. Turning to One Another Working Group – provincial regional reps, PHAs and agencies.
  2. Joint Planning Meeting – Collaborative project development work by ASO workers and PHA Facilitators from all provincial pilot sites.
  3. Training Session – for workers working directly with PHA Facilitators.
  4. Model Development Consultation – ongoing through feedback from project participants into process and materials.

### Research Context: Mid-project feedback from Joint Planning Meeting Participants

- Each year, the 10-day training program is free to PHA participants and ASO staff participated in a 2.5 day training session.
- Both groups participated in an annual 2.5-day Joint Planning Meeting which focused on mutual learning, sharing of successes and challenges ,and planning for the next project stages.

Participant-created  
Obstacle Course Exercise:  
“The road ahead is  
challenging, can I lend  
you a hand?”



### Assessing Participant Perceptions and Level of Engagement in TTOA:

- In February, 2011, the second Joint Planning Meeting had 9 ASO staff and 22 PHA community facilitators.
- Post-1 qualitative data was gathered at 3-months post-event, through a brief online questionnaire, using Survey Monkey.
- Goal of questionnaire was to determine participant perception of priorities, goals and possibilities at both an individual and community level.
- Feedback was received from almost 50% of participants.

### Post-1 Survey Findings:

- Themes in current priorities were around implementation within the ASOs key issues:
  - managing the flow of information
  - relationships within the organizations.
- Participants have concrete action-oriented goals around program and event development: ten projects identified.

### Participant Responses:

- “Determine what is expected from staff in relation to what they will provide to facilitators...”, “Better understanding of the facilitator in the roles/boundaries/limitations of staff.”
- “ Is there a part of the process that allows us to check-in with the Executive Directors and staff at the pilot sites to see if and how well they are connected to the ideals and work of TTOA? What are their challenges in staying connected?...”

### Pilot Site Activities Increasing

- “Our TTOA Working Group is moving forward to achieve the goals set out...”
- “We are talking regularly about where we are and what needs to be done.”
- “Getting the word out to PHAs that there are opportunities for them to attend TTOA. Getting my agency on board with the TTOA workplan.”

### Multi-level Engagement

- Participant's future orientation embraces:
  - **personal growth,**
  - **strengthening peer relationships,**
  - **on-going agency development in policy and practice**
  - **and addressing stigma.**

### CBR Approach: Incorporating Feedback into Model Development

- In response to JPM discussions and survey results from participants, there were shifts in the training design process and new resources were created to support local implementation.
- A 3-page Practicum Planning Form was created in June, 2011 for which both PHA Facilitators and ASO Workers are responsible.

### Meeting the Challenges of Relationship Building

- On-going dialogue and evaluation of this pilot is needed in order to address unique challenges at the local level.
- With high turnover of ASO workers, training to support their roles in support and supervision of PHA community facilitators is a critical aspect of the success of this initiative.

### Community Action Follow-up

Recommendations include:

- On-going follow-up and support of PHA Facilitator trainees for completion of practicums.
- Monitoring of PHA engagement and participation in ASOs as a provincial-level performance indicator.
- On-going follow-up with pilot agencies regarding internal organizational development, i.e. Terms of Reference for supporting increased PHA engagement such as the Peer Leader Program at PWA Foundation.

**TTOA Joint Planning Meeting 2009**




**JPM Closing Circle Facilitator, 2010:  
Graduate from PHA Facilitator Training 2008-09**



### 3. CAHR Poster 2012

## Essential Elements of Successful Adult Learning Techniques Utilized in PHA Facilitator Training: Learning Styles, Leadership and Dialog in a Safe Environment

Authors: Anna Demetrakopoulos, Yvette Perreault, & Claudette Samuels, AIDS Bereavement and Resiliency Program of Ontario; Chad Leaver, Rainbow Tribe Consulting



"Turning to One Another" Code of Conduct

I, as a member of the Turning to One Another (TTOA) network of people living and/or working with HIV/AIDS, am committed to building a strong, empowered, responsible and ethical community.

I commit to operating in a respectful manner that illustrates and values my personal and community integrity.

**OBJECTIVES:**

In 2009, the AIDS Bereavement and Resiliency Program of Ontario (ABRPO) and the Ontario AIDS Network (OAN) initiated a 10-day training program for people living with HIV/AIDS (PHAs). The program, entitled PHA Facilitator Training, is a collaborative initiative with PHAs and ASOs, and includes defined training objectives, competencies, and evaluation. This initiative aims to facilitate and accelerate the GIPA principle in the Ontario context and to enhance the leadership and community facilitation skills of PHAs.

**RESULTS:**

Participants identified key elements of the training as: learning styles (Kolb, 1984); small group work, where they demonstrated leadership through co-accountability; and dialog in a safe environment through direct peer support and structured feedback supported by the Code of Conduct.

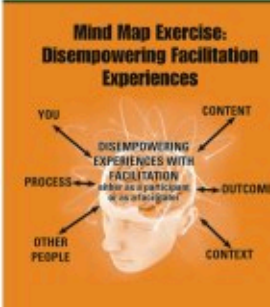
**METHODS:**

The three-part, 10-day training program was free to participants and open to PHAs who were actively involved in their local ASO. Two series were conducted between 2009-2011, with each beginning with 22 participants.. All sessions included longitudinal qualitative and quantitative evaluation using Structured Feedback Forms rating all aspects of the training (facilitators, learning tools and practical resources, process and overall contextual factors e.g. achievement of learning objectives, overall learning outcomes and components of the learning setting).

**CONCLUSIONS:**

These identified elements played a critical role in the success of these trainings. This comprehensive support is imperative to help PHA community facilitators in Ontario's ASOs integrate into new roles. Emerging leaders need support to maintain and develop skills through ongoing engagement, training and leadership development for PHA community facilitators.

**Mind Map Exercise: Disempowering Facilitation Experiences**





**Feedback Sheet for Scenario Presentations**


Comment on the following for each scenario presentation:

- What worked well about the presentation?
- What did you learn about facilitating this stage of a group's development?
- What would you have added?

- I. Forming
- II. Storming
- III. Norming
- IV. Performing
- V. Transitioning/Transforming








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## 4. CAHR Poster 2012



### Need for Organizational Tools and Processes Identified Through Participants in Turning to One Another PHA Engagement Project in Ontario

Authors: Anna Demetrakopoulos, Yvette Perreault, & Claudette Samuels, AIDS Bereavement and Resiliency Program of Ontario; Chad Leaver, Rainbow Tribe Consulting

**OBJECTIVES:**

In an effort to facilitate and accelerate the GIPA principle in the Ontario context, ABRPO has coordinated 'Turning to One Another' (TTOA) as an annual PHA facilitator training program and collaborative community development initiative involving 13 pilot site ASOs.


**METHODS:**

**Qualitative Feedback: "How's your journey so far?"**

Please tell us:

1. Please describe your current work or focus in relation to TTOA? (one point form is fine)
2. What is your primary goal for 2011? (events, meetings, other?)
3. Briefly complete this phrase: The possibility I am co-creating for myself and my community is the possibility of being:
  - a.
  - b.
  - c.

Both PHA Facilitator trainees and ASO frontline staff (n=35) participate in an annual Joint Planning Meeting for 2.5 days where successes and challenges, and planning for the next project stages takes place. Structured feedback, event evaluation and a post-1 questionnaire at three months through survey monkey were used to gather input from participants.



**RESULTS:**


In June, 2011, post-1 qualitative data was received from almost 50% of participants, indicating:

- Participant perception of priorities, goals and possibilities at both an individual and community level.
- Participants have concrete goals around program and event development, with ten follow-up projects identified.
- Feedback highlights key challenges of managing the flow of information and creating stronger, more effective relationships within the organizations at all levels.

**CONCLUSIONS:**

In response to verbal and written feedback from the participants, new tools and processes have been and will continue to be created to support practical planning and greater clarity of working relationships at the local level.

**All materials generated by this project, including funding proposals will be shared with those pursuing similar provincial or local initiatives.**



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