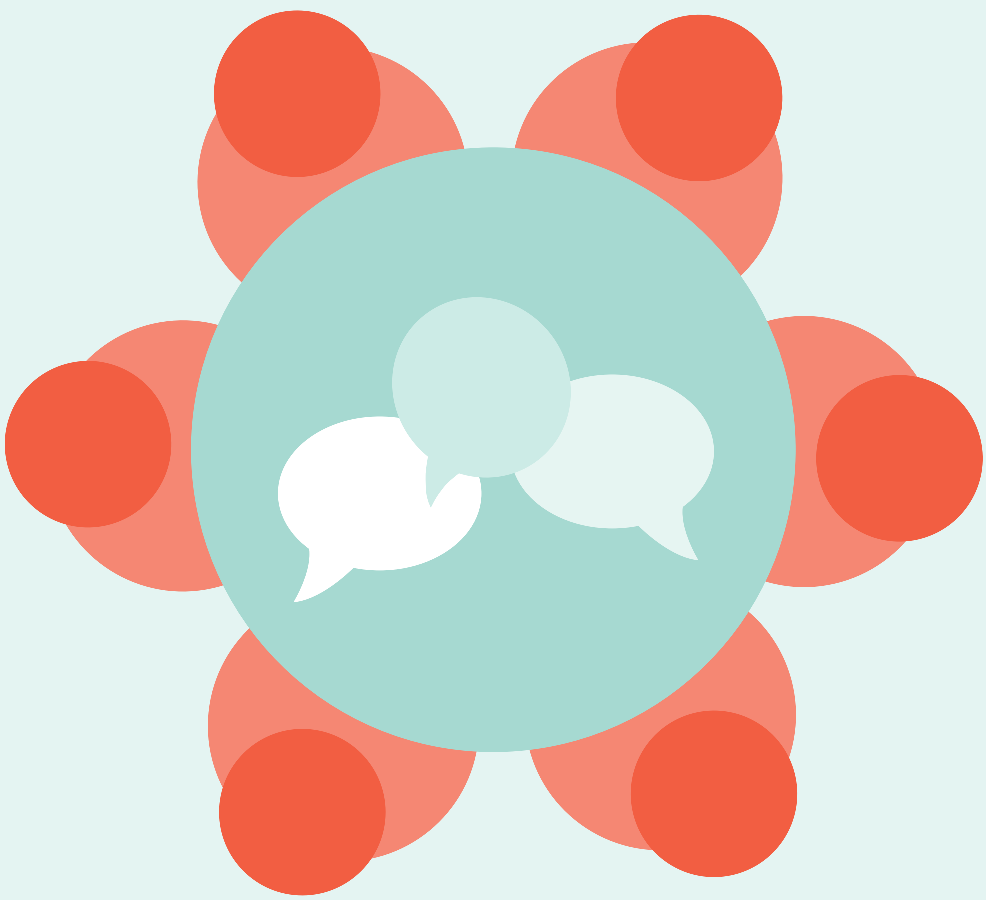
Supplement to the Training Guide for RWHAP Part A Planning Councils/Planning Bodies

# Using Training Guide Materials to Develop Orientation and Training for PC/PB Members



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## INTRODUCTION

This supplement to the Training Guide provides steps and suggestions for using the information and resources in the Training Guide modules to develop your own orientation and training sessions.

The ten modules of the Training Guide are designed to provide much of the information needed for PC/PB training. The modules provide:

- Training "content," based on the legislation, HRSA/HAB guidance and expectations, and sound practices.
- Training resources – editable presentation slides, activities with instructions, trainer notes, handouts, and references.
- Suggestions for use of the materials in each module.

PC/PBs are expected to provide orientation for new members and also some form of annual training, and often brief training segments are part of committee and PC/PB meetings. This supplement can help you develop engaging orientation and training sessions quickly and efficiently. By using Training Guide materials that explain concepts, HRSA/HAB expectations, and sound practices, you should have more time to tailor and "localize" content, adding information specific to your EMA or TGA.

This Training Guide Supplement walks you through the process of using Training Guide materials to develop various types of training sessions of varied lengths, including orientation for new members, a short training session for new committee leaders, and mini-training sessions lasting 20-60 minutes that you might use during full PC/PB or committee meetings.

Six sample PowerPoint slide sets, including quick activities to spark discussion and apply what has been learned, are provided as examples to show how to select and adapt Training Guide content and activities:

- PowerPoint 1: Planning Council New Member Orientation (full day training orientation)
- PowerPoint 2: Planning Council and Recipient Roles and Responsibilities (1-2 hour supplemental orientation)
- PowerPoint 3: Understanding the RWHAP Legislation (1-2 hour supplemental orientation)
- PowerPoint 4: Assessment of the Efficiency of the Administrative Mechanism (AAM) (mini-training less than one hour)

### Tailoring Training Materials to your PC/PB

When you plan an orientation or other training session for your own PC/PB, you will want to "localize" your slides and other training materials. For example:

- ☐ Add your logo and use your own slide format.
- ☐ Make general references specific – for example, if the slide says EMA/TGA, just use the one that applies to you; if yours is a planning council, use PC rather than PC/PB.
- ☐ Make sure terminology reflects your PC/PB – for example, ensure correct references to officers (e.g., Chair versus Co-Chairs) and committees (e.g., name of your PLWH caucus or committee, Executive versus Steering Committee)
- ☐ Add slides with local information relevant to the topic – e.g., committee structure, Bylaws provisions, or policies and procedures.

- PowerPoint 5: Updating & Use of Service Standards (mini-training less than one hour)
- PowerPoint 6: Training for New Committee Co-Chairs (short training, about two hours)

## DEVELOPING A PC/PB NEW MEMBER ORIENTATION

Every PC/PB needs to provide new member orientation. If your PC/PB has two- or three-year terms that all end at the same time, you may do a major orientation for new members once a year. If terms end at different times or there is turnover during the year, you may need to do individual or small-group orientation several times a year. Orientation immediately after appointment is very important to prepare new members for success, especially if they have limited HIV community planning experience – which is especially likely for members who are not employed at RWHAP Part A sub-recipient organizations or public health departments, such as many consumers and other people with HIV. The length of orientation varies, as do the topics covered. However, sound practice indicates that new member orientation should:

- Last at least half a day and if possible a full day – whether provided in one or multiple sessions.
- Be interactive, which means including activities to test, apply, and improve knowledge and skills.
- Cover topics important for new members soon after they begin involvement in both committee and full PC/PB meetings, so they become engaged and feel comfortable as quickly as possible.

The Training Guide provides a great deal of information useful in new member orientation. Following is a step-by-step guide to planning an orientation session and developing a comprehensive training "package", including: an agenda, training objectives, a slide presentation or similar summary of key information, experiential activities, carefully selected handouts for ongoing reference, and a session assessment. A sample slide deck for full day orientation session is included in this supplement as PowerPoint 1. This sample slide deck includes notes stating where the slides came from in the Training Guide and how they were tailored or adapted.

The ten-step process below assumes that in planning your orientation session you will use the Training Guide for information that applies to all RWHAP Part A programs and PC/PBs, and that you will supplement that with local information about topics such as your PC/PB's particular committee structure, Bylaws, policies and procedures, expectations for members and data on the local epidemic and system of care.

1. **Do initial planning.**

- Consider all planned orientation and training for PC/PB members that will be provided in the coming year, and the role of new member orientation within that plan.
- Agree on the length of training, and whether it will involve one or multiple sessions.
  For example:

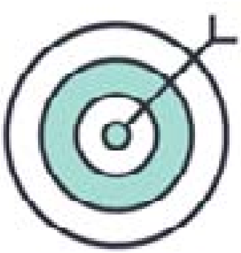
- ☐ Sound practice is to begin with a half-day or full-day new member orientation, ideally in-person, since this helps members get to know each other and begin to act as a team.
- ☐ Some PC/PBs ask all members to attend orientation annually, but more often the participants are the new members, with a few veteran members serving as co-trainers.
- ☐ PC/PBs may also want to do a separate additional session lasting about two hours that focuses specifically on PC/PB and recipient roles and responsibilities, including boundaries that the PC/PB should not cross. This session can be made a part of the annual PC/PB training that HRSA/HAB expects of all PC/PBs.
- ☐ A supplemental 1½-2-hour session on the RWHAP legislation, with a special focus on Part A, can be very helpful for new members with limited or no community planning or RWHAP knowledge and experience.

- Choose the training team and decide how responsibilities for developing and leading the orientation will be shared.
  *For example:*
  - ☐ PC/PB Support (PCS) staff, the PC Chair or Co-Chairs, and a representative from the responsible committee (usually Membership or Operations but sometimes Executive) often make up the training team.
  - ☐ The recipient frequently provides some training as well, often explaining the recipient's role and perhaps describing the system of care, or data from the most recent HIV care continuum.
- Decide what topics need to be covered and consider their relative importance.
  *For example:* Typical topics for the basic orientation include:
  - ☐ The Ryan White HIV/AIDS Program: What Every PC Member Should Know
  - ☐ Overview of PC and Recipient Roles, Responsibilities, and Boundaries
  - ☐ Planning Council Operations [national requirements plus local structures and processes]
  - ☐ The Planning Council and the System of Care
  - ☐ Understanding and Using Data
- Schedule the orientation session (s)—date and time.
- Choose and secure the location for the orientation. If the group is larger than 6-8, be sure there is room to seat participants at multiple tables so they can work on learning activities in small groups without having to move.

- Invite new members, and consider inviting any potential members who are currently being vetted by the CEO, associate or alternate members if your PC/PB has them, and individuals who are not PC/PB members but who serve on standing committees.

### Orientation Agenda

Prepare an agenda to hand out that will both inform participants and guide trainers. A sample orientation agenda for a full-day (9:30 am – 4:00 pm) orientation is shown on page 6.



**2. Draft orientation learning objectives.**

- Agree on learning objectives that specify what you want new members to know and be able to explain or do at the end of the orientation.

- Limit yourself to 5-6 objectives per session, so participants can focus on them.
  *For example:*
  Following the training, participants will be able to:

  1. Describe the purpose and scope of the Ryan White HIV/AIDS Program (RWHAP)
  2. List and describe at least 4 legislative roles and responsibilities of a Part A PC
  3. Differentiate PC and recipient roles
  4. Explain the importance of data-based decision making
  5. Describe the committee structure and operations of this PC
  6. List expectations for individual PC members

**3. Develop the agenda.**

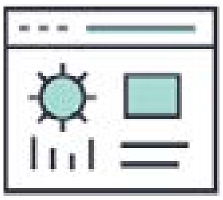
- Outline the training agenda, with start and end times, major topics in logical order, and breaks.

- Consider the content you need to present, and think about how much you can cover well in the time available. Since you need participants to retain and be able to use new knowledge, it is usually better to cover fewer topics in depth, giving participants time to discuss them and apply new knowedge through a learning activity, rather than to address many topics briefly, without opportunities for active learning.

- Develop your detailed training agenda, including topics, flow, and approximate timing, and the kinds of activities you want to include. Be sure to allocate enough time for activities in your agenda.

## Sample Planning Council Orientation Agenda
## 9:30 a.m. – 4:00 p.m.

| | |
|---|---|
| 9:30 – 10:00 am | **Welcome and Introductions**<br>• Welcome<br>• Activity: Participant Introductions and Icebreaker [example provided] |
| 10:00 – 10:45 am | **The Ryan White HIV/AIDS Program (RWHAP): What Every Planning Council Member Should Know**<br>• Activity: Pre-test: Who Does What and Why? [Module 2, Activity 2.2]<br>• Overview of the RWHAP<br>• RWHAP Part A<br>• RWHAP and HIV Community Planning |
| 10:45 – 11:00 am | **Break** |
| 11:00 am – 12:15 pm | **Overview of Planning Council Roles, Responsibilities, and Boundaries**<br>• Roles Matrix and Quick Feedback: Participant Familiarity with PC Duties<br>• Planning Council Duties, Recipient Duties, and Shared Roles<br>• Boundaries<br>• Activity: Checking Knowledge: Review of Roles and Responsibilities Matrix [Module 2, Activity 2.4] |
| 12:15 – 12:45 pm | **Lunch Break** |
| 12:45 – 2:00 pm | **Planning Council Operations**<br>• Activity: Participant Brainstorm on PC Operations<br>• Scope of PC Operations<br>• PC Support Roles<br>• Recipient Roles<br>• Committee Structure<br>• Expectations for PC Members |
| 2:00 - 2:45 pm | **The Planning Council and the System of Care**<br>• Concept of a System of Care<br>• Fundable Service Categories<br>• Activity: Describing the System of Care |
| 2:45 – 3:00 pm | **Break** |
| 3:00 – 3:45 pm | **Understanding and Using Data**<br>• Importance of Data<br>• Using Data in Decision Making<br>• The HIV Care Continuum |
| 3:45 – 4:00 pm | **Sum Up and Evaluation**<br>• Update of Quiz Responses<br>• Sum Up<br>• Session Assessment |
| 4:00 pm | **Session Ends** |



**4. Prepare your presentation.**

- Use a slide deck to guide flow and ensure that key points are made; it also provides a useful handout. If you don't like to use slides, try a handout outlining key points instead. Do project it if possible, since some participants learn best by both seeing and hearing content.
- As a starting point, use presentations that have already been developed, including the sample orientation PowerPoint in the [Compendium for Planning Council Support (PCS) Staff, Orientation and Training Section](#).
- Use existing slides and add new ones to put together your slide deck, including a title slide, learning objectives, topics list, and section and subsection title slides that break the presentation into manageable parts. ([See PowerPoint 1](#), a sample slide deck for a full-day orientation).
- Include a summary slide at the end of each main topic. To give it maximum impact, you could ask a PC leader or participant to present and explain the summary.
- Include slides that provide instructions for quick activities that actively engage participants and let them apply new knowledge.
- Don't put too much information on a single slide. The intent should be to highlight main points. This will remind the trainer what to cover and help the participants recognize the most important points. Be sure all trainers know that they should prepare talking points as needed, either on the Notes section of the slides or separately, should not just read their slides!

**5. Choose or develop learning activities.**

- Consider using a pre- and post-training quiz, like "Who Does What and Why" [[Module 2, Activity 2.2](#)]
- Include some quick mini-scenarios or discussion questions, a quiz or two, and other activities. Choose from among the many activities in the Training Guide or develop your own. Page 8 provides three examples of quick activities related to the Roles and Responsibilities matrix, the

### Ways to localize the slide deck to your PC/PB

- ☐ Include a chart or handout showing your PC/PB's committee structure along with the major duties of each committee.
- ☐ Include a slide about your Part A funding levels.
- ☐ In the list of service categories, identify service categories funded in your EMA or TGA by putting them in bold type.
- ☐ Provide the most recent HIV care continuum data for your EMA or TGA – if you have one for all PLWH and one for RWHAP clients, include them both.
- ☐ Consider including PPT slides with your Code of Conduct, and a sum-mary of key policies like Conflict of Interest.

## Examples of Quick Activities

1. **For use with the Roles and Responsibilities Matrix:**

   Looking at the Matrix:

   - Which roles are most familiar?
   - Which ones do you need to know more about?

2. **To increase understanding of the local System of Care:**

   Discuss at your table and then with the full group:

   Suppose you met a person with HIV who was getting HIV care through the RWHAP Part A program in another city but is planning to moving to your metro area. That person says: "Tell me about the system of HIV care, and how I can get access to both medical care and support services."

   - What would you say if the question came from [focus on one as assigned]:
     a. A young MSM of color?
     b. A transgender woman?
     c. A long-time HIV survivor aged 60+?
   - How prepared are you to answer this question?

3. **For discussing Conflict of Interest:**

   Which of the following situations may involve a conflict of interest?

   a. A funded service provider makes an impassioned plea for more funding for a particular service category. The provider has Part A funding for other services rather than that one, but is planning to apply when the service goes out for bid.

   b. Two PC members are very close friends but are not romantically involved. They both serve – and vote – on the same committee.

   c. A PC member who is an unaligned consumer is in a long-term committed relationship with someone who works for a funded service provider. The PC is about to vote on service allocations for that service category.

   d. A PC consumer member volunteers at a funded provider two days a week.

   e. Three of the four active members of the committee currently working on service standards are funded providers.

local System of Care, and Conflict of Interest. Use these as models for developing your own quick activities.

- Include at least one learning activity involving small-group work. Such activities help keep participants alert and involved, and greatly enhance retention and ability to apply new information or skills.
- The Training Guide has several activities that include multiple scenarios; you can use this type of activity in small groups, with each group responsible for discussing one scenario. For example, see Module 2, Activity 2.3: PC/PB Roles, Responsibilities, and Boundaries Scenarios.

**6. Choose or prepare handouts for ongoing reference.**

- Consider including some Quick Reference Handouts from the Training Guide, to make the information easily available for ongoing reference, especially during members' first year on the PC/PB.

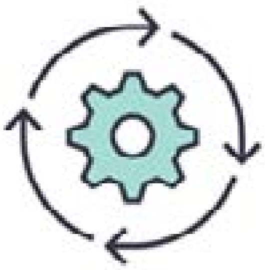
- At the beginning of the session, give participants copy of the final orientation slide set as a handout, preferably printed as two or three slides to a page. Some participants will find this useful for notetaking, so you might want to use the three-slides-per-page format that includes lines for note taking.
- Consider providing an orientation binder for PC/PB member that includes key documents such as:
  - ☐ Quick Reference Handouts from the Training Guide
  - ☐ a member list and contact information
  - ☐ information on meeting times and locations
  - ☐ descriptions of committees and perhaps committee assignments,
  - ☐ PC/PB Bylaws
  - ☐ expectations for individual PC/PB members, including Code of Conduct
  - ☐ key policies and procedures, like Conflict of Interest and Consumer Member Expense Reimbursements

## Quick Reference Handouts that may be Useful for Orientation

- ☐ Quick Reference Handout 2.1: What is RWHAP Part A HIV Community Planning? (explains the roles and uniqueness of planning councils)
- ☐ Quick Reference Handout 2.2: PC/PB Roles and Responsibilities – Defined by Legislation, Policies, and Guidance (summarizes roles and boundaries; a fairly detailed summary for ongoing reference)
- ☐ Quick Reference Handout 2.3: Quick Guide to RWHAP Part A-Fundable Service Categories (provides short descriptions of the core medical and support service categories that can be funded under RWHAP Part A and Part B)
- ☐ Quick Reference Handout 10.1: PC/PB Guide to Data Types and Sources (a listing and description of the types of data PC/PBs typically use in planning and decision making)

7. **Prepare methods to evaluate the session. This may include any or all of the following:**
   - Have everyone complete a brief evaluation form. See a sample form on pages 12-13.
   - Go around the room and ask each participant to identify the most important thing they learned, or offer a word or phrase that they feel describes the orientation.

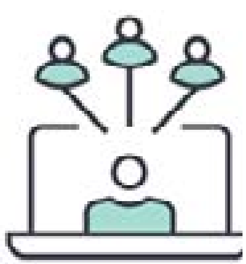
- Use the "plus/delta" evaluation method. Divide a piece of easel pad paper or whiteboard into two columns, label the left column Plus or +, and label the right column Delta or Δ. Ask participants to identify what they liked (the pluses), and what they would like to see improved or changed (the deltas). This approach provides useful information for improving future orientations.



8. **Review and revise your orientation materials, and make final preparations.**
   - Allow time for the team responsible for orientation to review the materials. Also arrange for some form of review by people who won't be part of the training team. If PC/PB member orientation is a responsibility of the same committee that handles membership, ask that committee to review the orientation materials at a meeting, or assign its Chair or Co-Chairs or a work group to do the review.

- Revise the orientation package as needed, and be sure everyone on the trainer team is prepared and ready.
- If feasible, arrange to record the presentations and full-group discussion portions of the orientation, so members who miss the training can watch it to catch up.
- Be sure all logistics – room arrangements, equipment, materials, etc. – are in place.

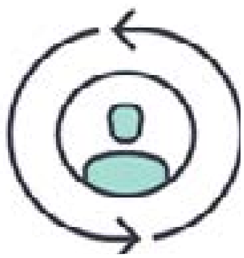
If you have a team of people conducting the orientation, plan to have a team member who is not presenting observe the participants to see if there are issues with engagement or comprehension. If it appears that some important information is not understood, find another way to present it, use more examples, or add a quick scenario to increase understanding. One of the benefits of a detailed agenda is that you can make informed changes during the session if required, understanding the time and content implications. It is better to cover a little less but have high comprehension and retention than to provide a lot of information that is not remembered or understood. Another session, perhaps a mini-session before the next PC/PB meeting, can be used to cover any topic that has to be dropped from the agenda.



9. **After the training: Decide what if any additional orientation and training new members need – and provide it.** Ask about this in the evaluation form. Then, after a careful review of oral and written session evaluations, debrief with the orientation team and any veteran members who observed it, to decide what (if any) additional orientation new members need. It is rare that an orientation session of less than one full day can cover all necessary topics, and even a full day may not be enough. The most common additional orientation needs include the following:

- More detail on PC/PB roles and responsibilities and the boundaries between PC/PB and recipient. (See Supplemental Orientation Session on Roles and Responsibilities on page 11.)

- For members without prior HIV planning experience, more background on the RWHAP legislation. (See Supplemental Orientation Session on RWHAP Legislation below.)
- Orientation to the work of their assigned committee, especially if they have not previously served on a PC/PB committee.
- Training on parliamentary procedures if the PC/PB uses *Robert's Rules of Order* to conduct its meetings.



**10. After the training: Revise and refine the orientation materials as needed and keep them for future use.**

- Review evaluations, and identify any aspects of the training or training materials that need revision. Make those revisions immediately.
- Decide how to use the orientation materials to orient new members who join the PC/PB during the year, as individuals or with one or two other people. If you made a video recording of the orientation, have it edited and use it, along with some face-to-face discussion, perhaps using activities from the orientation. Always try to include at least one veteran PC/PB member in such orientations.
- Keep the revised orientation materials for future use. Identify any slides, handouts, and other materials that will need annual updating.

## Supplemental Orientation Session on Roles and Responsibilities

The Planning Council New Member Orientation session (see PowerPoint 1) briefly discusses roles and responsibilities, and also explains planning council versus recipient roles and key boundaries. This supplemental session on PC/PB and Recipient Roles and Responsibilities goes into more detail about the major legislative roles of the PC (recommended roles of a PB). It uses the same Roles and Responsibilities Matrix as an overview, but the focus this time is specifically on PC/PB roles that members need to understand and help carry out.

A sample slide deck for this supplemental session is provided as PowerPoint 2. A session using it can be provided in 1½ to 2 hours. There are several quick activities to break up the presentation and enable participants to apply new knowledge, so it is interactive without requiring a lot of time for activities. A more intensive activity could, of course, be added, or some of the "Applying Knowledge" quick scenarios could be done in small groups, if additional time is available and you feel more hands-on experience is needed.

## Supplemental Orientation Session on RWHAP Legislation

The supplemental orientation session on the RWHAP legislation is designed for new PC/PB members (or new committee members) who have little or no prior HIV planning experience or involvement with RWHAP, expect perhaps as clients or as volunteers at RWHAP-funded service providers. New Consumer Committee or Consumer Caucus members might also find it useful.

The Planning Council New Member Orientation session (see PowerPoint 1) provides a few slides describing the purpose and scope of the legislation; basic facts like target population, payor of last resort, and funding based on annual appropriations; and background on RWHAP Part A. This supplemental session provides information about each of the RWHAP Parts and how they interrelate.

## Sample Evaluation Form for New Member Orientation

1. Overall, how useful was the orientation for new members?
   ❐ Not at all ❐ A little ❐ Moderately ❐ Very

2. Following the training, to what extent are you able to:

| Objectives | Not at all | A little | Some-what | Largely | Fully |
|---|---|---|---|---|---|
| 1. Describe the purpose and scope of the Ryan White HIV/AIDS Program (RWHAP) | 1 | 2 | 3 | 4 | 5 |
| 2. List and describe at least 4 legislative roles and responsibil-ities of a Part A PC | 1 | 2 | 3 | 4 | 5 |
| 3. Differentiate PC and recipient roles | 1 | 2 | 3 | 4 | 5 |
| 4. Explain the importance of data-based decision making | 1 | 2 | 3 | 4 | 5 |
| 5. Describe the committee struc-ture and operations of this PC | 1 | 2 | 3 | 4 | 5 |
| 6. List expectations for individual PC members | 1 | 2 | 3 | 4 | 5 |

3. Please rate the following aspects of the training:

| Aspect of Training | Poor | Fair | Good | Very Good | Excellent |
|---|---|---|---|---|---|
| Presenter/Trainer | | | | | |
| Overall skills as a trainer | 1 | 2 | 3 | 4 | 5 |
| Knowledge of Ryan White Program | 1 | 2 | 3 | 4 | 5 |
| Ability to keep participants engaged throughout the training | 1 | 2 | 3 | 4 | 5 |
| Ability to answer participant questions | 1 | 2 | 3 | 4 | 5 |
| Training | | | | | |
| Content of the orientation | 1 | 2 | 3 | 4 | 5 |
| Reference materials and handouts | 1 | 2 | 3 | 4 | 5 |
| Overall organization and “flow” of session | 1 | 2 | 3 | 4 | 5 |
| Level of interaction among participants | 1 | 2 | 3 | 4 | 5 |
| Use of interactive exercises | 1 | 2 | 3 | 4 | 5 |

4. **What were the greatest strengths of this session?**

5. **What are the most important limitations or weaknesses of this session – the things you would most like to change?**

6. **Do you expect to do anything differently because of the orientation?**

   ❒ Yes ❒ Not Sure ❒ No

   If yes, what?

7. **What, if any, additional orientation or training do you need to be an effective Planning Council member? [Check up to 3.]**

   ❒ None

   ❒ More information on the Ryan White HIV/AIDS Program legislation and Parts

   ❒ More in-depth information on Planning Council and recipient roles and responsibilities

   ❒ How to carry out specific Planning Council roles (Which ones? _________________)

   ❒ Parliamentary Procedure/Robert's Rules of Order

   ❒ Understanding of the system of care in this jurisdiction

   ❒ Understanding and using data – for data-based decision making

   ❒ Planning Council member roles as both an advocate and a planner

   ❒ Other (Specify___________________________________________________)

8. **Please add any additional comments or suggestions.**

9. **Are you:**

   ❒ A new Planning Council member (serving for less than 3 months)

   ❒ A new Planning Council member (serving 3-12 months)

   ❒ A new committee member but not a Planning Council member

   ❒ An individual who has been recommended to the CEO for appointment to the Planning Council

   ❒ A Planning Council or recipient staff member

   ❒ Other (please specify ____________________________________________)

A sample slide deck for this supplemental session is provided as PowerPoint 3. A session using it can be provided in about one hour, and might be scheduled before or after a regular PC meeting. If most of the new members who want this training are PLWH, it might be provided as part of a Consumer Committee or Consumer Caucus meeting. The session is interactive; it includes a quiz on RWHAP Parts and a quick scenario to apply knowledge on collaboration.

## DEVELOPING SHORT AND MINI TRAINING SESSIONS

Except for orientation of new members and perhaps an annual retreat or training day, most PC/PB training sessions are relatively short. You may want to provide a 1-2 hour session during a committee meeting to train new members or build skills, but you are most likely to find yourself preparing mini-training sessions of less than an hour for use during PC/PB or committee meetings. For example, many PC/PBs provide training on Priority Setting and Resource Allocation (PSRA) requirements and their PSRA process just before their PC/PB starts PSRA activities.  When a training topic–for example, understanding needs assessment–is likely to benefit all PC/PB members, you may wish to do a series of 20-30 minute mini-training sessions during full PC/PB meetings over a period of months.

The steps for developing any training session lasting a half day or a full day are similar to those for developing new member orientation sessions. Developing shorter sessions, however, involves some slightly different considerations:

**Your slide deck will be considerably shorter**. There is no magic number of slides appropriate for a short training session, but a good starting point is the following:

- About 35 content slides (plus the title slide) for a two-hour session
- About 20 content slides for a one-hour
- Not more than 8-12 content slides for a mini-session lasting 20-45 minutes.

You will need fewer supporting slides; while you will want to include a title slide and a training objectives slide, slides to divide the training into sections are rarely needed.

**You should include something interactive, but there probably will not be time for a major activity.** A typical activity for applying new knowledge and skills usually takes an hour, including instructions, small-group work, reporting back, discussion, and a sum-up. Once in a while, you may provide an hour of training and an hour applying the training – for example, if you are adopting a new approach to developing directives, you might want the group to spend some time using that approach to develop a sample directive. But more often for short training sessions, you will need to make the activities quick. *For example:*

- You can use a quiz so participants can self-assess what they learned – either pre- and post-session, or just at the end of the training. (Module 2: Roles and Responsibilities, Activity 1 provides an example of a pre- and post-training quiz.)
- You can include several "mini-activities" – quick scenarios or discussion questions that fit on one slide – to check or apply knowledge. Many of the Training Guide modules include these quick activities, that you can use as is or adapt to meet your needs.

**Sometimes you may want two versions of the training presentation, one for the responsible committee, the other for the full PC/PB.** *For example:*

- A new task force or committee responsible for the Assessment of the Administrative Mechanism (AAM) may need training that covers each step in AAM planning and implementation, while the entire PC/PB may only need a quick overview of the legislative basis, scope, products, process, and timing. The committee slide presentation is likely to be a bit longer, including more information on steps in implementing the AAM, and perhaps a more substantial exercise to ensure a shared understanding of the AAM.
- If your PC/PB changes its committee structure, the members of a newly established or restructured committee may want a detailed presentation and discussion of the implications for their responsibilities, work plan, and calendar. The entire PC/PB may be satisfied with an overview and a detailed chart of responsibilities under the new structure.

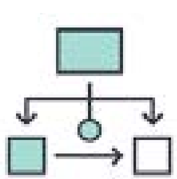
**A handout for people to keep for ongoing reference is always a good idea,** but it isn't necessarily something you have to develop. Always provide a copy of your slide set. Use one of the Training Guide's Quick Reference Handouts where relevant. Sometimes the appropriate handout already exists among your PC/PBs internal documents, for example a copy of your new or revised PSRA process, the updated conflict of interest policy and disclosure form, your AAM process and tools from last year, or a chart of your committee structure and the roles of each committee.

Developing short training sessions based on information from a single Training Guide module is usually fairly quick and easy. Examples 1 and 2 that follow provide the steps for developing mini-trainings (less than 1 hour), using materials from a single Training Guide module.

The training development process can be more complex when the information comes from multiple modules, many different aspects of the topic are covered, and you want to develop a short training session lasting up to two hours. Example 3 provides suggested steps for using Training Guide materials to develop such a training for new committee officers.

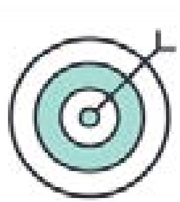
## Example 1: Mini-Training on Assessment of the Administrative Mechanism (AAM)

Training Guide materials can help you develop mini-training sessions quickly. This example walks you through the steps to develop a mini-training on AAM for the entire PC/PB, using Training Guide materials. A sample slide deck for this mini-training on AAM training is provided as PowerPoint 4.



1. **Agree on the mini-training topic and scope.** *For example:*

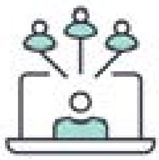
- AAM as a Legislative Responsibility
- Importance of the AAM
- HRSA/HAB Expectations: Scope and Boundaries
- Challenges
- Steps to Carry Out the AAM



2. **Agree on the training objectives.** *For example,* To be sure everyone on the PC/PB understands and can explain:

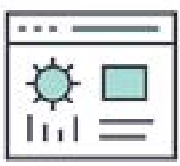
- The legislative requirement for the AAM

- The scope and limits of the AAM
- Expected steps for carrying out this year's AAM



**3. Decide who will develop and provide the training.** *For example:*

- PC/PB Manager will take the lead on preparing the mini-training materials, with the Co-Chairs reviewing and editing them.
- Mini-session will be led by the PC/PB Manager and the Co-Chairs, since the AAM will be carried out by a work group under the Executive Committee; PC/PB Manager will present AAM importance, legislative responsibility, and HRSA/HAB expectations; Senior Co-Chair will introduce the training and present challenges and probable AAM steps; Junior Co-Chair will facilitate the mini-scenario.



**4. Identify, then revise and customize materials from the Training Guide to fit your EMA or TGA.** Use the [Training Guide Index by Topic ]to find materials that focus on AAM; under AAM in the index you will find slides, a scenario activity, a quick reference handout and key concepts and terms. Then tailor the Training Guide materials you selected to fit your jurisdiction. For example:

- Add your logo to the slides.
- Indicate on a slide whether your PC/PB is including the optional component, subrecipient engagement with the PC/PB in the planning process.
- If you have an established AAM process, replace the suggested steps with your actual steps.
- Add timing for this year's AAM.
- Include one scenario or discussion question slide to check understanding and help participants apply the information provided. Customize selected quick scenarios and quick discussion questions as needed.

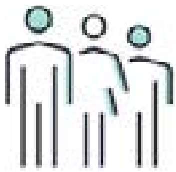
**5. Choose or develop a handout for ongoing reference.**

- If you are introducing the concept of an AAM or if the AAM process has been problematic in the past, use [Quick Reference Handout 7.2, Assessment of the Administrative Mechanism].
- If you have an established process for AAM, and want to familiarize members with it, hand out the description of that process, which may be in policy and procedures format.

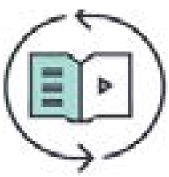
**6. Choose a method for evaluating the session.** You may want to use an evaluation form or you may prefer to do some kind of quick oral assessment. *For example:*

- Use objectives as an oral review and assessment. Read out each training objective and ask for a show of hands to determine how many participants feel the objective has been met.
- Go around the room asking each participant to provide a quick statement of the most important thing they learned.

- Use the Plus/Delta format to ask participants to indicate what "worked" in the mini-training and what should be done differently.



**7. Provide the training, then debrief.** Keep track of how long the session took, and have someone observe the group to see whether participants seem engaged. Sit down with the team that planned and carried out the training and perhaps 1-2 key PC/PB members (including at least one consumer member) to debrief.



**8. Refine the materials for different uses, and keep them for future use.** If you need to provide similar training to another group – for example, more extensive training to a new committee or task force that will be implementing the AAM, or similar basic training to potential members or your consumer committee, revise the materials as needed, using the first experience to guide revisions. Since you carry out the AAM every year, keep the materials for similar training next year.

## Example 2: Mini-Training on Service Standards

This quick training for PC/PB members on service standards provides an example of how a mini-training session of 20-30 minutes can be combined with a committee report or other presentation during a regular PC/PB meeting. A sample slide deck for this mini-training and committee report on service standards provided as [PowerPoint 5](PowerPoint 5).

Part A programs are required to have service standards for all funded service categories, and planning councils (and sometimes planning bodies) play a lead role in developing and updating these service standards. Sound practice is to review and update service standards every few years, and of course to revise them when service models change. For example, if telehealth becomes an allowable means of providing some services in system of care, that will need to be reflected in your service standards. In addition, some PC/PBs are putting more emphasis on universal standards that apply to all service standards, or trying to make service standards more concise and easier to understand. Of course, service standards will need to be developed if you begin funding a service category for the first time.

Often, the committee responsible for care strategy or system of care takes the lead on developing and updating service standards, working with the recipient. However, the entire

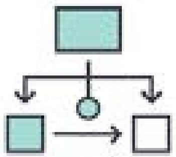
### Context for Service Standards Development

This sample training session is based on the following situation:

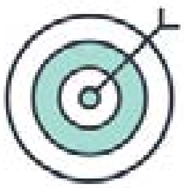
- ☐ The (mythical) South County RWHAP Part A program does not have a process in place for regularly reviewing and updating its service standards.
- ☐ The South County Planning Council (SCPC) has asked the System of Care Committee to develop a plan for developing universal standards of care, updating current service standards, and then regularly reviewing and updating service standards in the future.
- ☐ Most current SCPC members have had little involvement with service standards, so they need some quick basic training.
- ☐ The Committee will provide the PC with a combined mini-training session and progress report and recommendations at the next PC meeting.

PC/PB needs to understand the importance, use, and scope of service standards and the process your RWHAP Part A program uses for developing them.

Here are the steps you might follow in developing this mini-training on service standards.

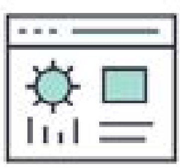


1. **Agree on the mini-training topics and scope.** *For example:*
   - Background: Definition, Types and Users of Service Standards
   - HRSA/HAB Expectations and Guidance
   - Issues/Challenges in Developing Service Standards
   - Committee Plans and Proposed Guidelines for Reviewing and Updating Service Standards [based on sound practice]
   - Next Steps for the PC



2. **Agree on the training objectives.** *For example:* To ensure that all PC members can describe:
   - The definition, use, and scope of service standards
   - PC responsibilities for developing, reviewing, and updating service standards, working collaboratively with the recipient

3. **Decide who will develop and provide the training.** The Committee Co-Chairs will provide the training, with PCS staff assisting with development of the slides and the recipient explaining how the recipient uses service standards.



4. **Identify, then revise and customize materials from the Training Guide to fit your EMA or TGA.** Use the Training Guide Index by Topic to find materials that focus on service standards; under Service Standards in the index you will find slides, and quick scenarios to apply knowledge. Then tailor the Training Guide materials you selected to fit your jurisdiction. *For example:*
   - Add your logo and put the slides into your preferred slide format.
   - Edit the service standards slides so there are about 8-10 content slides, to fit within your allotted training time. (See sample PowerPoint 5).
   - Be sure your proposed guidelines for development and review of service standards review and updating reflect sound practices, as described in Training Guide Module 7.
   - Activity: In this case, there would likely be discussion of and action on the proposed guidelines rather than an activity from the Training Guide.

5. **Choose or develop a handout for ongoing reference.** In addition to a copy of the slide set, the Committee might hand out HRSA/HAB's Service Standards: Guidance for Ryan White HIV/AIDS Program Grantees/Planning Bodies, developed in 2014. The Committee's proposed guidelines for service standards review and updating will also be needed if the PC is to vote on them.


6. **Choose a method for evaluating the session.** You will probably want a quick oral assessment of the training provided, *for example:*
   - Read out each training objective and ask for a show of hands to determine how many participants feel the objective has been met.

- Go around the room asking each participant to provide a quick statement of the most important thing they learned, and any additional questions they have.
- Use the Plus/Delta format to ask participants to indicate what "worked" in the mini- training and what should be done differently.

**7. Provide the training, then debrief.** Be sure to discuss how the use of a combined mini-training session and committee presentation worked. This model can be used to provide quick training associated with PC/PB presentations, providing new knowledge and skills efficiently and without the need for a special training session. For example, you could use a similar process to provide a quick session on some aspect of data along with a data presentation, or a session on conflict of interest when presenting the plans for the annual PSRA process.

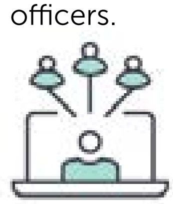
**8. Refine the materials for different uses, and keep them for future use.** New PC/PB or committee members may need this training in a year or two.

## Example 3: Short Training Session for PC/PB Committee Officers

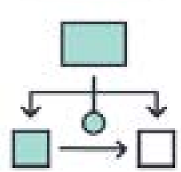
Leadership transitions happen every year in most PC/PBs. Most have a chair and vice chair or two co-chairs for the PC/PB as a whole and for each standing committee – and sometimes for ad hoc committees, task forces, and/or caucuses. Committee officers may be appointed by the PC/PB Chair or elected by the committee. Usually but not always, both committee officers are also PC/PB members. Typically they have been PC/PB members for at least a year, so they have received some orientation and training and have served on a committee. Terms of office are often one year but allow for re-election, and often begin either in January or in March (the first month of the RWHAP Part A funding year). Often the committee has one "veteran" co-chair and one new co-chair, so the new co-chairs have access to some mentoring and on-the-job training. (For simplicity, we will refer to the committee officers as co-chairs.)

A sample slide deck for a short training for committee leaders is provided as PowerPoint 6. It was developed for the mythical Southeast Metro Planning Council (SEMPC), which has four standing committees. Each committee has two elected co-chairs, at least one of whom should if possible be a consumer. SEMPC is the PC in a TGA and has two PCS staff: a manager and an administrative assistant.

The following steps and processes can facilitate the development of a training for committee officers.



**1. Decide who will develop and provide the training.** For committee co-chair training, you might decide that the PC/PB Chair and two experienced committee co-chairs will work with the PC/PB manager to develop and deliver the training, with the group planning the training and the PC/PB manager taking responsibility for ensuring that the slides and handouts – including a Committee Co-Chair Binder – are prepared.



**2. Decide on the scope of your training, and identify key training topics.** Many factors may affect the scope and topics for the training. For this training, you might want to consider the following:

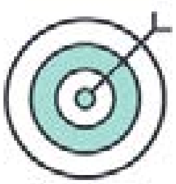
- *Who should be trained – only new committee officers or all co-chairs?* If your committees are operating well and you have some experienced and effective veteran committee co-chairs, they probably don't need the training, and their willingness to participate may be a question. Perhaps you may want to train just the new members, but have 1-2 veterans help provide the training, then do a joint planning session as part of an expanded Executive Committee meeting.
- *How many people need training?* Consider the number of new committee chairs. Training a group of 6-8 requires a bit more planning and management than a group of 3-4, and you may want to split the group for an activity or two.
- *How much planning experience do the participants have?* If some of the new co-chairs have been on the PC/PB for only a few months, or if some are not PC/PB members (as is often the case for non-governance committees such as the Consumer Committee or the committee responsible for needs assessment), they may need more basic information than co-chairs with a year or more of service on the PC/PB.
- *How much training do they need to be successful?* This means considering how demanding the role of a committee co-chair is, and how much staff support is available to them. Less PC/PB staff support may be available to co-chairs in a small TGA with one PC/PB support staff member, so the co-chairs may play a larger role in tasks like developing an agenda and preparing minutes than in a large EMA with multiple PC/PB support staff. A larger role and less staff support suggest a possible need for more extensive training.
- *How much of the training content is already documented in writing?* For example, some PC/PBs have policies and procedures or other materials that address committee processes. If you have written descriptions of committee roles as well as policies and procedures that describe key planning processes, the new co-chairs need to become familiar with them, but will be able to prepare themselves for many of their roles. If there is little documentation, they will need more training about tasks and expectations.

Based on this information, if you are a TGA with limited staffing, you might make the following decisions about the scope of training:

- Provide a two-hour session for new committee co-chairs, and devote some time at the next Executive Committee meeting to do some additional training and planning with all officers present, with a focus on committee work plans and collaboration across committees. If only one co-chair of each committee serves on the Executive Committee, invite all co-chairs to this session.
- Because most of the co-chairs have a year or two of PC/PB experience, meet individually with the 1-2 who do not, preferably before the training, to fill in knowledge gaps for them about the PC/PB and its committees.
- Put together a Committee Co-Chair Binder with copies of policies and procedures relevant to their responsibilities. Briefly review legislatively required policies and procedures during training, but limit the amount of time spent on this part of the training.
- Explain very clearly the extent and limits of PC/PB support staff assistance available to committee co-chairs.

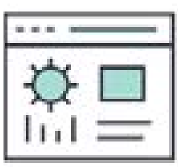
This training might cover three main topic areas:

- *Roles and responsibilities of committee co-chairs* (development and use of work plans, planning and running meetings, preparing committee reports, training and mentoring members, etc.)
- *How committees in this PC/PB operate and interrelate* (committee structure and assignments, decision-making processes, participation by PCS staff and recipient staff, access to data, collaboration across committees, consumer and community input, etc.)
- *Written tools and other supports available to the committee co-chairs* (annual planning calendar, committee work plan format, minutes format, general policies and procedures such as conflict of interest and committee-specific policies and procedures, committee support from PCS staff , etc.)



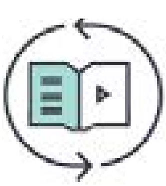
3. **Develop the training objectives.** *For example,*
Following the training, new committee co-chairs will be able to:

- List and describe their roles, including pre-meeting, meeting, and follow-up responsibilities.
- Describe how this PC/PB's committees operate, in terms of membership, access to information, decision making, and reporting their work and recommendations to the full PC/PB.
- Explain the support PC/PB staff will provide and the limits of that support.
- Identify the written policies and procedures they expect to use in their roles as committee co-chairs.



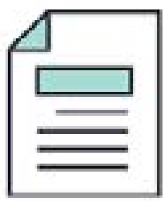
4. **Identify, then revise and customize materials from the Training Guide to fit your EMA or TGA.** Several modules in the Training Guide include materials that can be used to support training for new officers. In the Training Guide Index by Topic, look under the following topics to find relevant materials: Committees, Meetings, Minutes, PC/PB Officers, Staffing and PC/PB Support. To create and customize a slide presentation for your training session for new officers, review the Training Guide slide sets you found via the Index and tailor them to fit your training objectives.

- Begin by identifying the slides that address the topics you want to cover.
- Organize the slides by topic so they are in the desired order.
- See if any content is missing, and add slides if it is.
- Prepare Title, Topics, Objectives, and Summary slides, and perhaps subhead slides for each major topic.
- Add your PC/PB's logo and use your preferred slide format.
- Modify content so you have the content you need and a workable number of slides for your session – for this two-hour session, about 35 content slides, plus the title, subhead slides, and other supporting slides.



5. **Choose and refine or develop learning activities.** Since this training will involve a small number of participants, and because it is a two-hour session, you have time for either one more in-depth activity or about three quick scenarios or discussions. Use of quick activities throughout the session have the advantage of checking knowledge several times and keeping participants engaged.

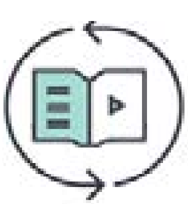
For this type of training, where you are only working with new co-chairs but many committees also have a veteran co-chair, you can also use a follow-up assignment that involves all your committee co-chairs. This helps ensure that the training leads to good planning by both co-chairs and provides a useful transition from training to assuming committee responsibilities. For ideas, look at the quick activities and other activities with scenarios that are part of relevant Training Guide modules, especially Modules 8, 9, and 2. The quick activities are embedded in the PowerPoints, each on a single slide. If they seem appropriate, refine them as needed to fit your situation. If not, develop your own, perhaps using them as models. Space them out across the training. Sample PowerPoint 6 includes two quick discussions and one scenario, as well as a follow-up assignment. The follow up assignment, focused on sharing responsibilities, asks the new and veteran co-chairs to meet, agree on, and document an initial division/sharing of responsibilities, and to document their decisions, and also to identify “officer development needs” for discussion at upcoming expanded Executive Committee meeting that will include all co-chairs.



6. **Choose handouts for ongoing reference.** In addition to a printout of the slide set, you will probably want to provide other handouts. For training of committee co-chairs, you might want to prepare a Committee Co-Chair Binder, available electronically or in hard copy, with Bylaws, policies and procedures, and templates for committee work plans and minutes/meeting summaries. If you have your annual program/PC calendar, include that. You may want to choose some additional handouts from the Training Guide. For example, for this training, any of the Quick Reference Handouts from Module 9 might be useful: Handout 9.1 – Preparing Minutes, Handout 9.2 – Effective Meetings: Tips for PC/PB and Committee Chairs/Co-Chairs, Handout 9.4 – Roles and Task for PC/PB Leadership, Handout 9.5—Training and Supporting PC/PB Officers as Leaders, Handout 9.6—Ten Strategies for Inclusive HIV Community Planning.

7. **Choose a method for evaluating the session.** You might want to use a quick written assessment for a two-hour session like this, especially since you may want to provide similar training in the future. *Training Techniques and Aids for Trainers and Facilitators* provides a sample format, or you may have your own preferred evaluation format. Alternatively, you could put several key questions on a slide and ask participants to write down their answers to those questions paper, then both discuss their responses in the group and hand in the paper with their responses. Since the group for this kind of training is likely to be small, there should be time to get input from all participants. PowerPoint 6 includes this kind of quick combination written and oral assessment.

8. **Provide the training, then debrief.** Since you may have turnover in committee co-chairs during the year, consider recording the training for future use. Include in the debrief everyone who helped to plan and implement the training. Agree on any changes needed in the content or presentation of the session. If you use a follow-up activity as the sample training does, consider the results of that assignment in deciding what changes may be needed.



9. **Refine the materials for different uses, and keep them for future use**. You are likely to be training new committee co-chairs at least annually, so make any needed changes in the materials and save them. Be prepared to use the revised materials (and the recording if you made one) to provide either individual or small-group training for new co-chairs during the program year.

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