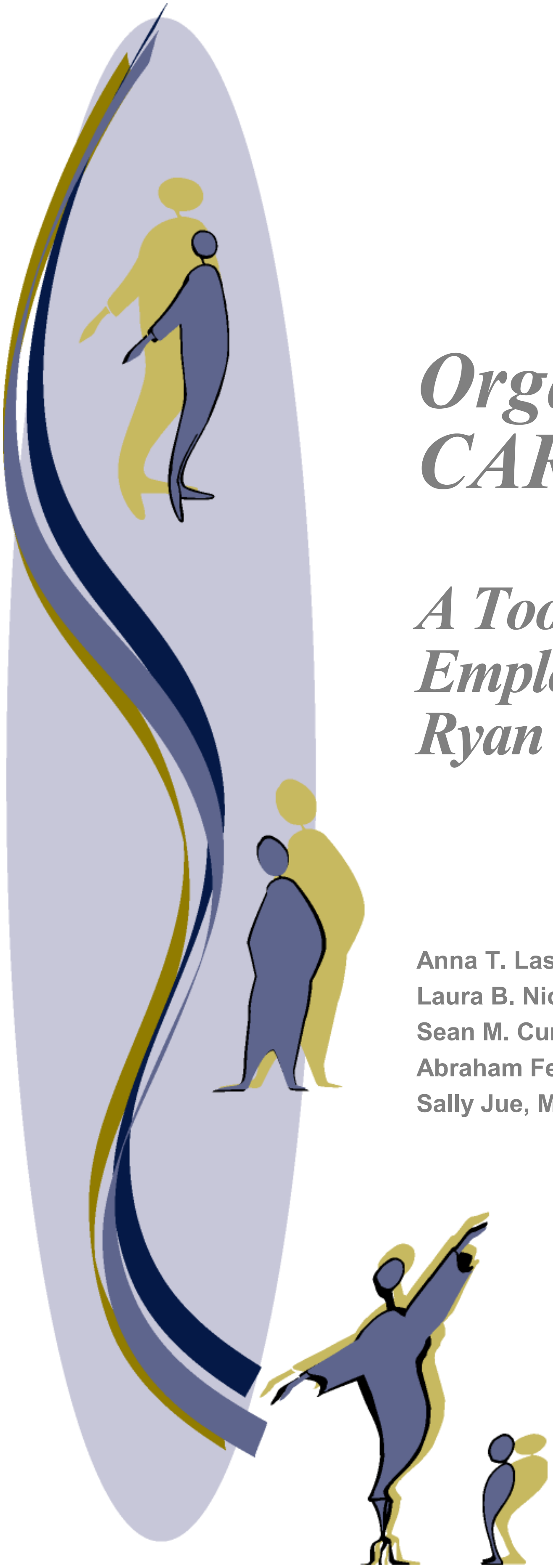

Organizations That CARE:

A Toolkit for Employing Consumers in Ryan White CARE Act Programs

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- Children's Diagnostic and Treatment Center
  Comprehensive Family AIDS Program, Fort Lauderdale, Florida
- The Core Center/Hektoen Institute
  Women and Children's HIV Program and Adolescent HIV Program, Chicago, Illinois
- Justice Resource Institute
  JRI Health, Boston, Massachusetts
- Metrolina AIDS Project
  Caring for Families Program, Charlotte, North Carolina
- University of California, San Diego
  Mother, Child, and Adolescent HIV Program,
  San Diego, California.

We are indebted to the program directors and all the program staff members who generously gave their time and expertise during our on-site visits. Their willingness to honestly share the wealth of their experiences, the challenges they faced, and the lessons they have learned was invaluable. Most important, our deepest appreciation goes to the many consumer staff members who either participated in focus group meetings or telephone discussions. Their voices give credibility and reality to our work. Words of simple thanks seem inadequate for all the wisdom they shared with us.

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Finally, we acknowledge the support of Caroline Watler, President, Circle Solutions, Inc., whose constant encouragement allows us to pursue work we not only truly love to do but which also makes a difference in the lives of people in our communities. We hope that *Organizations That CARE: A Toolkit for Employing Consumers in Ryan White CARE Act Programs* does just that!

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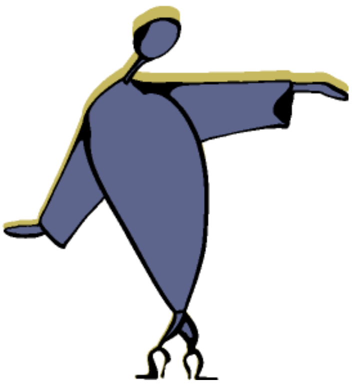
Section 1

Toolkit Fundamentals

“Here are the basics:
Select consumers who have a love for doing the work,
Provide them with the tools to be professionals,
and be accomodating to their situations.”

— a consumer staff member



Section 1
Toolkit Fundamentals

More than any other public or private initiative, the Ryan White Comprehensive AIDS Resources Emergency (CARE) Act has contributed to the understanding and appreciation of the enormously valuable resource that people living with HIV disease (PLWH) are, not only to Ryan White CARE Act (RWCA) programs but to all workplaces. For almost two decades, the Health Resources and Services Administration (HRSA), HIV/AIDS Bureau (HAB) has encouraged RWCA programs to think creatively about the engagement of consumers in all aspects of their program operations. From small private nonprofit organizations to large university- and hospital-based programs, local RWCA initiatives have implemented a wide range of strategies to employ consumers. This toolkit is designed to help programs serving PLWH develop strategic approaches for the employment of consumer staff members.

Employing Consumers: Cultivating Organizations That CARE

Consumers bring extraordinary life experiences and, indeed, unique perspectives to RWCA programs. Although consumers may be struggling with their own vulnerabilities and those of their children and families, they are often the strongest and best advocates, outreach workers, peer counselors, educators, community liaisons, and, in some programs, program coordinators and directors. The challenge for organizations is to fully integrate consumers into their programs. Successful programs hire consumers because of the perspectives and talents they offer and not because programs feel they have "a need" for a consumer presence.

Organizations that successfully employ consumers have a number of things in common. They have:

- An organization-wide (from the highest levels of management on down) commitment to employing consumers and accommodating their needs at all levels within the organization.
- Consumer-friendly policies that address the organization's readiness to employ consumers, including policies for compensation, benefits, promotion, training, and education.
- An organization-wide awareness of all the areas in which consumers may be effective, including program planning, management, service delivery, training, community outreach and

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education, and program evaluation; and they have identified the required skills for the position(s).

- Created workplaces where job descriptions, compensation, and benefits foster the full engagement of consumers while accommodating consumers’ needs for medical and social benefits.
- Supervisory structures and relationships that support and mentor consumer staff members without compromising professional boundaries among the care provider, the supervisor, and the consumer.
- Invested in continuous professional development and growth opportunities for the entire staff, including supervisors and consumer staff members.
- Processes that elicit feedback from consumers and continually engage their full participation.

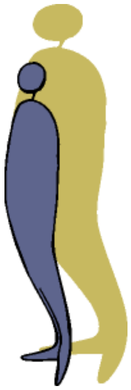
Creating organizations that fully engage consumer staff members is challenging and time-intensive, requiring uncommon creativity and commitment. However, the benefits to the organization, the program, and consumer staff members and the clients they serve are extraordinary. We hope this toolkit will inspire and guide you to create organizations that allow the unique perspectives of consumer staff members to be integrated into Ryan White CARE Act program operations in ways you never dreamed possible!

How to Use the Toolkit

This toolkit is a step-by-step guide to the best practices of organizations that have created workplaces that foster consumer engagement in all levels within the organization. These organizations have creatively used their resources to recruit, hire, supervise, support, and train consumer staff members. The sections of the toolkit are:

- Section 1, Toolkit Fundamentals
- Section 2, Organizational Readiness: Planning for Consumer Staff
- Section 3, Recruiting and Hiring
- Section 4, Compensation and Benefits
- Section 5, Supervision and Support
- Section 6, Professional Development.

You can read the toolkit from start to finish; or you can pull out, read, and use any section by itself. Each section has “tools for success” which include worksheets as well as sample of job descriptions, organizational policies, and training agendas. When appropriate, sections address special issues related to youth programs. Throughout the toolkit, additional resources and practical advice from the field are highlighted in: “Advice from the Field”—reflections from RWCA programs about lessons they have learned over the years of implementing their programs; “Learn More About It”—detailed descriptions of innovative strategies or



policies and procedures that affect RWCA programs and consumers; "Read More About It"—references to other publications addressing a particular issue.

Please note that the toolkit is not copyrighted. We hope you will photocopy and disseminate anything and everything in this toolkit that you find useful. We hope that the toolkit will help you create organizations that CARE.

Section 2

Organizational Readiness: Planning for Consumer Staff

> *"In the planning process, you can never plan enough for how you will address a wide range of issues."*
>
> *— a program coordinator*

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Section 2
Organizational Readiness: Planning for Consumer Staff

What to Expect in This Section

For many organizations, strategic planning is seen as a luxury. However, creating a workplace that goes beyond accepting PLWH as a "part" of the program to actively engaging and supporting consumer staff members at all levels requires commitment—from the organization's highest levels of management to current program staff members. Engaging in a strategic planning process allows Ryan White CARE Act (RWCA) programs to step back from day-to-day activities and take a thoughtful approach to answering the following questions:

- What are the fundamental principles that guide this organization's philosophy with respect to the employment of consumers?
- What policies, procedures, and practices are currently in place to support the employment of consumer staff members, and what are the gaps in these policies and practices?
- What changes in policies and practices must we institute to fully engage consumers in all aspects of program operations?
- In what timeframe will we be able to implement the agreed-upon changes in policies and practices?
- How should resources be allocated to fully engage consumers in a timely manner?

Action Steps to Implementation

The planning process includes the following action steps:

- Establish an organizational philosophy that articulates the value of employing consumer staff members throughout the program or organization.
- Achieve "buy-in" from all levels of management and program staff members for supporting the employment of consumer staff members.
- Assess organizational policies and procedures affecting the employment of consumer staff members.
- Develop policies and procedures that specifically address the needs of consumer staff members.

- Finalize policies and procedures with human resources or personnel department.
- Create an inclusive organizational culture.

Action Step 1: Establish the Organizational Philosophy

Ryan White CARE Act programs should clearly articulate an organizational philosophy that values the expertise of consumer staff members. As such, programs should:

- Examine their organization's mission and the services they currently provide with an eye toward determining how consumer staff members might best fulfill unmet service needs throughout the program or organization.
- Clearly and convincingly articulate their organizational philosophy about the value of consumer staff members to other staff members, clients, and the community.

Action Step 2: Achieve Organizational Buy-In

Gaining the Support of Key Administrators

All levels of organizational management and program staff members must support the employment of consumer staff members. In particular, the support of key administrators is critical because they often set the tone for staff members at other levels of the organization and for the community at large. To gain the buy-in of key administrators, you must clearly explain how hiring consumer staff members will affect:

- The program's ability to attract and retain clients.
- The agency budget.
- Current staffing and work allocations.
- Liability issues.
- Labor issues—unions, employment issues for minors, and so on.
- The agency's image in the community and thus its ability to raise funds, market its services to a wider range of consumers, and attract other potential stakeholders.
- Existing program and agency systems and infrastructure—do we have the space and equipment for them? What changes might we have to make to reasonably accommodate consumer staff members?

Making a strong case for the positive impact that consumer staff members will have on the program and organization, and your willingness to do your part to ensure their success, will greatly facilitate administrators' support. Clearly describe what administrators can do to

Advice from the Field: Why Hire Consumers?

- Many clients are more comfortable talking to their peers.
- Consumer staff members have a credibility that comes from the living with HIV.
- Consumer staff members are positive role models for their clients.
- Consumer staff members can give programs helpful feedback from a perspective other staff members do not have.
- Consumer staff members can be great program representatives and advocates.

Tools for Success

Use Tool for Success 2.1, Key Issues to Explore with Program Staff, to help you gather input about employing consumer staff members.

demonstrate their support for employing consumer staff to other staff members and the community.

Getting the Support of Program Staff Members

Because program staff members will be working most closely with consumer staff members, it is imperative to win their support. If you hire consumer staff members from your client base, program staff members may already have service provider/client relationships with incoming consumer staff members; in which case, both parties will need to make some major adjustments that may be initially uncomfortable.

It is important to create a safe environment in which all staff members can discuss their concerns about hiring consumers, anticipate challenges to the employment of consumers, clarify consumer staff members' roles and responsibilities, and agree on how consumer staff members will interface with clients and nonconsumer staff members. In addition, it is important to ensure that the confidentiality of consumer staff members is respected and protected.

Action Step 3: Review Organizational Policies and Procedures

Comprehensive workplace policies are a critical first step in preparing organizations for the employment of consumer staff members. PLWH are entitled to the same rights and opportunities as people with other catastrophic illnesses, including the ability to perform their jobs as long as they are physically and mentally able to do so. Effective workplace policies and procedures typically encompass the following elements:

- **A right to employment and protection against discrimination.** This policy articulates that HIV/AIDS is considered a "handicapping condition" or "disability" within the meaning of Federal (especially the American with Disabilities Act of 1990 [ADA]), state and local laws governing workplace discrimination.
- **Specific provisions for reasonable accommodation.** This policy articulates specific accommodations, including more flexible work schedules or restructuring of an employee's position, and describes the procedure that will be used to determine the accommodation.
- **Right to privacy and confidentiality.** This policy articulates that an employee's medical history is confidential and that all employees must comply with the provisions of Health Insurance Portability and Accountability Act of 1996 (HIPAA).
- **Provisions for health and life insurance and other support benefits.** This policy describes available health and insurance benefits, including how extended coverage conversion coordinates with options under state or Federal laws; examines life insurance plans; and reviews disability plans.

Advice from the Field: How Administrators Can Demonstrate Support for Hiring Consumer Staff Members

- Promote hiring consumer staff members in the agency and out in the community.
- Discuss the value of consumer staff members, how they benefit the program, and what the agency will do to support them.
- State the agency's/ program's expectations that all staff members are to be included and treated equally and respectfully.
- Let staff members know that the agency will not lower performance standards for consumer staff members and will protect their confidentiality.
- Acknowledge that having consumersin the workplace may be a learning process for everyone.
- Participate in planning efforts.
- Make the necessary policy changes and retain consumer staff members.
- Model the behavior you expect from staff members.

Advice from the Field: Know the Law

If you do not have policies and procedures in place, learn what state and Federal laws apply.

One of the challenges of working with consumer staff members, as well as other staff members with medical problems, is managing prolonged absences due to illness. What policies and procedures does your organization currently have? How long will you or can you hold a job for someone on medical or family leave? If you cannot hold a person's job open long enough, what are the person's options when he or she returns to work? How will you provide adequate coverage during the person's absence?

- **Training and education policy.** This policy delineates consumer education efforts, including education for other program employees and training for managers and supervisors about the provisions of the organization's policy.

  See Section 6, Professional Development, for a more detailed discussion of how to design comprehensive training programs and how to take advantage of existing national and state educational opportunities.
- **Supervision and support structure.** This structure describes the designated manager for coordinating the organization's consumer recruitment, hiring, and support efforts and includes a commitment to regularly scheduled meetings, such as weekly or monthly meetings, for the supervision and support of consumer staff members. Programs should ensure that clinical/counseling services are provided by someone other than the consumer staff member's direct supervisor.

  See Section 5, Supervision and Support, for a discussion of how to structure supervision and support consumer staff members.
- **Continuous reassessment and update of policies and practices.** This statement articulates how workplace policies and practices will be updated to accommodate changes in Federal, state, and local laws and regulations as well as the program's growth and consumer staff members' needs.

Programs should have policies and procedures regarding alcohol and other drug use in the workplace as well as how to deal with drug-dependency problems, particularly repeated relapses. All programs, especially those receiving state and Federal funding, must to be aware of state and Federal laws related to substance abuse by employees, including confidentiality, disclosure of information, and drug testing as a condition of employment.

Action Step 4: Develop Policies and Procedures That Specifically Address the Special Needs of Consumer Staff Members

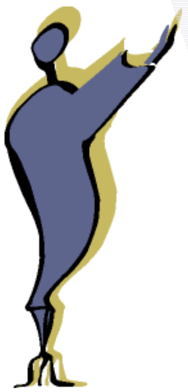
Programs may wish to design specific procedures to assist consumer staff members in clarifying how they will:

Learn More About It:

ADA and Reasonable Accommodation
Reasonable accommodation is broadly defined as making a modification that would enable an otherwise qualified employee to perform essential roles and responsibilities. A reasonable accommodation may include, but is not limited to, making existing facilities accessible, restructuring a job or modifying work schedules. However, reasonable accomodation is not absolute. Thus, a PLWH who is actively engaging in alcohol/substance abuse may not be protected under ADA. It is not improper to deny employment for illegal drug use, even though the individual is infected with HIV.

HIPAA
HIPAA affects a broad range of health care organizations. The privacy standards, under HIPAA, are strict; they:

- Limit the nonconsensual use and release of private health information.
- Give patients new rights to access their medical records and to know who else has accessed them.
- Restrict disclosure of health information to the minimum needed for the intended purpose.
- Establish new criminal and civil penalties for improper use or disclosure.
- Establish new requirements for access to records by researchers and others.



- Access clients
- Protect confidentiality of clients
- Document client encounters
- Document interactions with other programs on their clients' behalf
- Interface with other staff members working with the same clients
- Terminate clients
- Receive supervision.

Be sure to get input from consumer staff members and their co-workers about how these policies and procedures are working and what changes will lead to improvements.

Action Step 5: Finalize Workplace Policies

The human resources or personnel department can be a valuable asset in helping to finalize workplace policies and answer a number of liability, labor, job classification, and compensation questions.

Action Step 6: Create an Inclusive Organizational Culture

Although formal policies and procedures can help ensure a fair working environment for consumer staff members, there are other factors that make a workplace a "good" place to work. For example, consumer staff members expect a family-friendly environment that values their contributions. Thus, as RWCA programs assess their organizational readiness for consumer staff members, they will want to foster:

- Family-friendly policies and procedures that take into account the health and benefits needs of consumer staff members
- Sensitivity to the stress of dealing with HIV/AIDS at work and at home and giving employees opportunities to renegotiate job hours and responsibilities and/or obtain other assistance with managing stress
- Accountability for consumer staff members—not sacrificing job performance standards for consumer staff members
- Continuous mentoring for consumer staff members
- Opportunities for continuous professional development and feedback on performance.

Tools for Success

The checklist in Tools for Success 2.2, How Do We Measure Up?, can help programs further assess their organizational readiness for employing consumer staff members. Tools for Success 2.3, Developing a Confidentiality Policy/Statement, is a checklist to help RWCA programs design a confidentiality policy.

Learn More About It:

Creating Nurturing Organizations for Consumers

Employer qualities that facilitate consumer staff success include:[1]

- Treating all employess, including people with disabilities, equally
- Welcoming diversity and being inclusive
- Using a more personal and flexible management style
- Focusing on a worker's performance, not the disability
- Providing accommodations to all employees
- Matching workers capabilities with the job requirements
- Having the ability to supervise a diverse workforce.

[1] Gilbride, D., Stensrud, R., Vandergoot, D., and Golden, K. (2003). Identification of the Characteristics of Work Environments and Employers Open to Hiring and Accommodating People with Disabilities. *Rehabilitation Counseling Bulletin,* 46(3):130–137.

Read More About It!

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Tools for Success 2.1
Key Issues to Explore with Program Staff

1. What do we need and want consumer staff to do?
2. How will consumer staff access clients?
3. Who will supervise consumer staff?
4. If you have been providing services to the consumer staff we hire, how will that impact your relationship with them?
5. If you continue to be the service provider to the consumer staff we hire, how will you manage being a provider and a co-worker? What will help you manage this?
6. What unique confidentiality issues might come up and how can we manage them?
7. What other boundary issues might come up?
8. What training or information do we need in order to successfully integrate consumer staff into our program?
9. What can we do to ensure consumer staff feel welcome and included?
10. What is the best way to give feedback to consumer staff and each other about how things are going?
11. What is the best way to encourage feedback from consumer staff?
12. What kind of support do we need from program/agency administrators and our co-workers in order to make this work?
13. For youth workers, what developmental issues might we encounter and how might we effectively deal with them?

Tools for Success 2.2
How Do We Measure Up?

Liability Issues

1. Does your current liability insurance adequately cover hiring consumer staff?
2. If not, what does your agency need to do in order to address this issue?
3. If you are hiring youth consumers who are minors, will they be covered by your liability policy? What will it take to obtain coverage?

Labor Issues

1. If your program has labor unions, would your consumer staff positions be union positions?
2. If so, how might that affect hiring, compensation, benefits and disciplinary actions for consumer staff?
3. If you are hiring under age youth consumers, what are the labor laws in your state for employing minors? Will you need parental consent? What about emancipated minors?
4. If you are hiring minors, are there labor or other laws that might prohibit minors from fulfilling the job responsibilities you want them to do? Are there laws that regulate the number of hours minors can work and/or the amount of supervision you must provide?

Job Requirements and Compensation

1. Are there educational, health or other requirements that you may need to get waived for consumer staff? If so, what do you need to do to obtain waivers? How might this affect benefits and compensation?
2. If you outsource consumer staff, what formal agreements do you need to make with your collaborating organization? Who in your agency needs to review, approve and sign off on the agreement?
3. What kind of reference checks, drug screening, medical examinations or other conditions of employment might cause difficulties in hiring consumers? For example, if your organization requires drug testing, consumers may be on medications that could mistakenly cause them to fail drug tests. If your organization requires job references, what do you do if you want to hire someone who has had no previous job experience?
4. How might we offer employment in ways that will not jeopardize the benefits consumer staff may already be receiving?
5. Have we appropriately reallocated the workload and redefined the job responsibilities for employees who will be supervising and interfacing with consumer staff? Will those supervising consumer staff require a different job title/classification and therefore additional compensation? If so, do we have the funding?

Don’t Forget to Ask…

1. Do we have the workspace and equipment consumer staff members will need? If not, what do we need to do to obtain these items?
2. Have we properly budgeted for consumer staff? Did we include indirect costs in our calculations?
3. What resources do we have or need to obtain for consumer staff development, especially if they need additional or different training than other staff?

Tools for Success 2.3
Developing a Confidentiality Policy/Statement

RWCA programs can consult the following checklist to help them develop a comprehensive confidentiality policy/statement.

Before You Begin …

1. Thoroughly understand your state laws regarding the confidentiality of HIV/AIDS information, including …
    - what information is protected by the laws
    - what are the legal consequences for disclosing confidential information
    - what are the implications of the state law on employment-related questions
2. Check with human resources personnel in your agency about any existing organizational policies addressing privacy and confidentiality, including …
    - how will the new policy revise/expand or potentially conflict with existing policies
    - who needs to review and approve the confidentiality policy

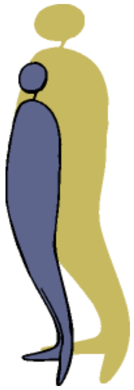
Elements of a Confidentiality Policy/Statement

The policy/statement should …

1. State the philosophy of the program/organization to comply with state laws and organizational policy addressing privacy and confidentiality.
2. Describe what information is to be held confidential.
3. Who the confidentiality policy affects.
4. What are the consequences of disclosing confidential information
5. Who is a resource for more information about the confidentiality policy.

After You Have Developed the Confidentiality Policy …

1. Disseminate the policy widely across the program/organization.
2. Conduct either a "brown bag" or other training session about the policy.
3. Incorporate the confidentiality policy in the employee handbook.
4. Include training on the confidentiality policy during all orientation sessions of new staff.
5. Conduct period reviews and on-going training about the confidentiality policy for all staff.



6. Develop a written confidentiality agreement for all employees to sign, which states that they have read the policy, understand it, and understand the consequences for violating the policy.

Section 3

Recruiting and Hiring

> *"Use your client base. Let it snowball;*
> *let them take the lead; they are the experts.*
> *Go to them first; allow them to spread the word."*
>
> *— a program director*

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Section 3
Recruiting and Hiring

What to Expect in This Section

A well-thought-out plan for recruiting and hiring consumer staff members can save time and money, but more important, a strategically designed plan can achieve a successful hire. Recruiting and hiring efforts that fail can be devastating for both the program and the consumer. As you plan, be sure to include consumer staff members in as many steps as possible. To assist you in planning for recruiting and hiring, consider the following action steps to implementation.

Action Step 1: Ensure Organizational Readiness

Prior to recruiting and hiring consumers, make sure the following activities have been successfully completed:

- Evaluate the need for, and understand the value of, a new consumer position
- Achieve buy-in from program administrators and staff members
- Prepare the organization's workplace for consumer employment
- Ensure that all administrative processes are in place to bring on a new employee
- Define important characteristics that you would like the consumer employee to possess, such as high school degree or equivalent, valid driver's license, or preferred personal experience with HIV/AIDS.

Tools for Success

See Tools for Success 3.1, Before You Recruit. If you have not completed these essential steps and plan to hire, please refer to Section 2, Organizational Readiness, of the toolkit to assist you in laying this critical foundation.

Action Step 2: Create a Specific Job Description

The job you are creating should have clearly defined roles and responsibilities. To reduce confusion over responsibilities and role boundaries, these roles and responsibilities should be written into a formal job description. Elements of a comprehensive job description include:

- A clear role and carefully defined responsibilities within the context of the organization.

Tools for Success

Tools for Success 3.6, When Creating a Contractor Agreement, will help you ensure you have addressed all the terms of employment.

- Job expectations, including any unusual time commitments (evenings and weekends) and travel requirements.
- Required or preferred job-related qualifications, skills, experience, and interests.
- A clearly defined amount of time (either as a percentage of a full-time position or the number of hours per week) that the job will entail. This should include the actual working hours (for example, 9:00 a.m.–1:00 p.m., Monday through Friday).
- The name of the employee's supervisor.

Action Step 3: Prepare to Recruit and Hire

As you start the recruitment process, you will want to lay a foundation for your efforts:

- **Define your time frame.** Be realistic about how long it might take to find the right person, and plan how the program will conduct its' work while the search is in progress.
- **Determine your strategies and resources.** Will you have funds to advertise in the local paper? If not, determine how you will effectively advertise the position without funds.
- **Determine who will lead recruiting and hiring efforts.** Select someone or a small team to lead the effort, taking care to include key persons such as existing consumer staff members, the prospective supervisor, and others who will work directly with the new employee.
- **Anticipate any difficult issues that may arise during the recruiting and hiring phase.** For example, if the job description (for example, peer educator) requires the new employee to disclose their HIV status, and a promising candidate says that he would prefer not to disclose, how will you handle this? The earlier you can plan, the more prepared you and your staff will be to handle complex issues that may arise.

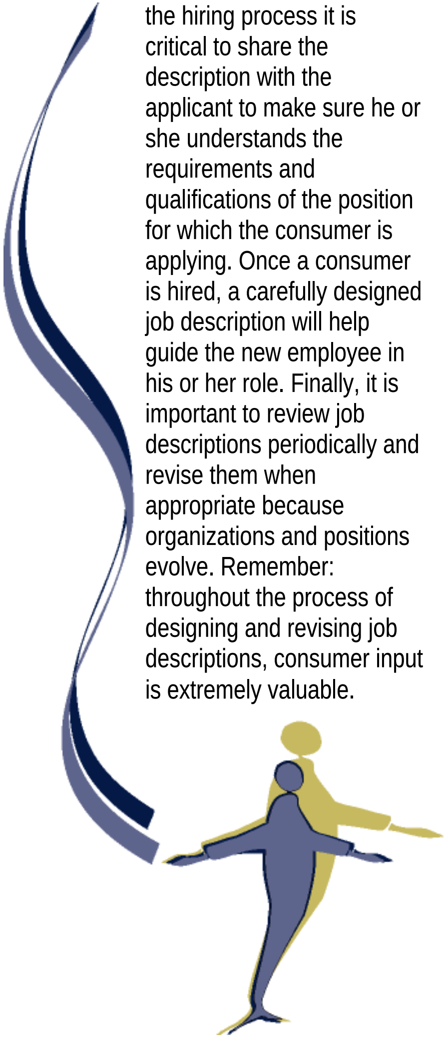
Action Step 4: Establish Hiring Incentives You Plan to Offer

During the recruiting and hiring process, it is important to identify and, if necessary, create employment incentives for consumer staff members. These may include:

- Benefits (medical, dental, vision, retirement, sick leave, life insurance, short- and long-term disability insurance)
- Competitive pay, bonuses, and vouchers
- Flexible hours and scheduling
- Employee Assistance Program or other formal support mechanisms

Advice from the Field: Job Descriptions Are Imperative!

A job description has uses throughout the hiring and employment process. During the hiring process it is critical to share the description with the applicant to make sure he or she understands the requirements and qualifications of the position for which the consumer is applying. Once a consumer is hired, a carefully designed job description will help guide the new employee in his or her role. Finally, it is important to review job descriptions periodically and revise them when appropriate because organizations and positions evolve. Remember: throughout the process of designing and revising job descriptions, consumer input is extremely valuable.



Tools for Success

Tools for Success, 3.2, Client Advocate, and 3.3, Community Health Specialist, are two examples of job descriptions from JRI Health.

- Working in an organization that values and supports PLWH
- Working in a medical center that specializes in HIV and thus having even greater access to its resources, including clinical trials
- Potential travel opportunities
- Potential career advancement opportunities
- Accommodation or subsides for childcare, transportation, and other logistical issues
- Mentoring, especially from experienced consumer staff.

See Section 4, Compensation and Benefits, for a more detailed discussion of these issues.

Action Step 5: Define Recruiting Expectations of Applicants

Your recruiting strategy should convey clear expectations of applicants and information on how to apply. Include the following information in your advertising materials:

- The job title and description
- Qualifications and experience necessary
- Expectations (for example, must provide own transportation, knowledge of HIV/AIDS issues, be bilingual)
- Compensation range, benefits, and other incentives
- Application logistics (for example, resume and cover letter, references, submission deadline)
- Program and key contact information.

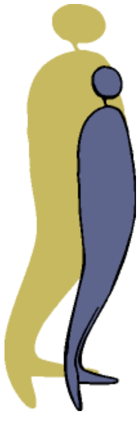
Action Step 6: Focus Your Recruiting Efforts and Recruit!

You may want to recruit internally or externally, or you may want to use both strategies. The following paragraphs offer some guidance.

Recruiting Within Your Organization

When recruiting within your organization, you will draw from your own client base and seek candidates who may have served on your consumer advisory boards or been active in other consumer groups. Make announcements at meetings; post flyers around the organization; and advertise through newsletters, e-mail, and Web sites. Keep in mind that word of mouth can be the best way to spread the word that you are hiring. The benefits to recruiting internally include:

- Knowledgeable staff members who are familiar with the candidate and understand the program's needs can make direct referrals.



- Staff members may have had the opportunity to observe the candidate in peer situations, including having experience with the candidate's skill sets and personal qualities that may (or may not) make for a good employee.
- Recruiting internally can, however, lead to challenges including potential discomfort of program staff members who may know when a consumer is not medically compliant.

Recruiting in the Community

When extending recruiting strategies beyond your organization, HIV/AIDS service providers and other human service agencies in the local community are a good place to start. Web sites, newsletters, and meetings and support groups associated with these organizations are likely to be strong means of spreading the word.

Action Step 7: Think Creatively About Recruiting and Hiring Issues

You cannot plan for everything. You can, however, identify issues that may arise when recruiting and hiring:

Consumer Readiness

Take care to assess potential consumers' readiness to work in HIV service programs. This assessment is easier to accomplish when you are hiring internally because a long-standing relationship may already be established and a more accurate prediction can be made concerning readiness. You may want to consider hiring staff part-time with the option to increase hours after an assessment period.

Confidentiality Concerns

Give consumers clear explanations of confidentiality policies and assurance that their confidentiality will be strictly maintained. In addition, they will be expected to maintain other's confidentiality. Consumer staff members may need to think about the implications of their employment on their families. For example, if the parent of an HIV-positive child is hired as consumer staff member, then what protections can be made to protect the confidentiality of the child and family?

Disclosure

Finding consumers who are willing to disclose their HIV status may be a challenge. If your position requires disclosure, this requirement should be repeatedly expressed to the applicant during all recruitment and hiring activities to avoid any misunderstandings.

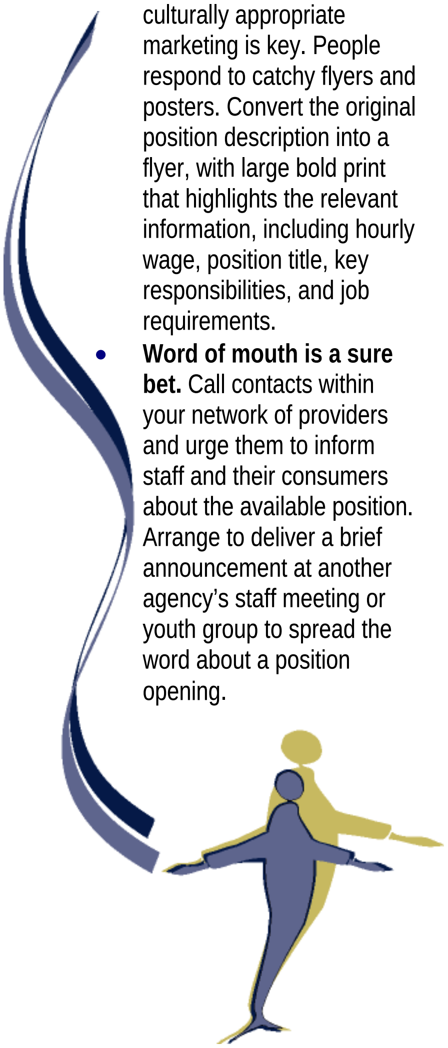
Cultural Issues

Strive to recruit applicants who reflect your client population. This practice will provide your program with a valuable link to your clients. However, do not compromise the integrity of the position requirements simply to achieve representation.

Advice from the Field: Recruitment Strategies

You may wish to use the following strategies to recruit consumer staff members:

- **Circulate position openings where potential consumer staff members will see it.** Use resources that they access, such as drop-in centers and other HIV-related programs, community magazines and publications, coffee shops, and other settings.
- **Position description must have appeal.** Age and culturally appropriate marketing is key. People respond to catchy flyers and posters. Convert the original position description into a flyer, with large bold print that highlights the relevant information, including hourly wage, position title, key responsibilities, and job requirements.
- **Word of mouth is a sure bet.** Call contacts within your network of providers and urge them to inform staff and their consumers about the available position. Arrange to deliver a brief announcement at another agency's staff meeting or youth group to spread the word about a position opening.



Action Step 8: Resume Review and Selection for the Interview

If your recruitment efforts have been successful, you or your hiring team will have resumes to review as you begin to select potential candidates for interviews. If consumers express interest in a job but do not have a resume, be prepared to give them referrals to free resources that will assist in resume development. Having a resume is essential to successful job seeking and a critical component to becoming employed.

As you review resumes, be flexible. Although some candidates may not possess all the qualifications and skills you seek, the potential candidate may meet most of the requirements and could be trained in areas where he or she falls short. However, be resolved to stay true to the position responsibilities as they are defined in the job description.

It is a good rule to select three to five promising applicants per position to interview. When you inform applicants that they have been selected for an interview, be mindful that they may have varying experiences and expectations in seeking professional jobs. Make sure applicants understand that they are not being offered an actual job, but that the interview is an important milestone in the hiring process. To alleviate potential fears, you will want to clearly describe the next steps in the hiring process. Remember to congratulate the applicant in making it to the interview stage!

Action Step 9: Interviewing Process and Strategies

Although the job applicant may be a client and well known to the program, it is important to approach the interview as you would any professional face-to-face interview. Prepare for the interview by reviewing the applicant's resume, making notes, and asking questions. Dress appropriately and be prepared to discuss why the program and consumer would benefit from the services of the new consumer staff member.

Consumers should interview with the program staff person who will be designated as their supervisor, the program director, and another consumer staff member. You may want to include in the interview process other program staff members who will be working with the consumer staff members. These interviews can be with individuals or groups; but keep in mind that a large group may be intimidating for some applicants.

The goal of the interview is to determine whether the applicant and the position are a "match." The following guidelines will help you approach the interview:

- Does the candidate have the skills and experience to successfully conduct the job responsibilities?

Tools for Success

Tools for Success 3.4, Confidentiality Agreement, is an example of how one RWCA program facilitates employees understanding of adherence to the organization's confidentiality policy.

Tools for Success

Tools for Success 3.5, Interview Tool, provides suggestions on structuring your interview.
In addition to an interview, you will want to conduct the following steps to assist you in hiring decisions:

- Discuss potential travel requirements.
- Contact job references.
- Conduct drug tests—make sure consumers disclose if they are on medication that can interfere with the test.
- Conduct a criminal background check. Background check may take as long as a month thus hiring should be contigent, and this should be outlined in employment offers.
- Be clear on organizational policies and assess the interviewee's comfort level with these policies.

Finally, you may want to add the following strategies:

- If you are hiring for a position for which telephone skills are necessary, start with a telephone interview. This approach can allow you to evaluate the candidate's phone etiquette.
- If you are unsure about a candidate but want to give him/her a chance, hire contingent on a successful training period.

- What special assets would the candidate bring to the job?
- How will the candidate fit in to the organization's environment (that is, especially if it is team or individually oriented)?
- Does the candidate have any outside responsibilities that will directly interfere with his or her ability to conduct the job or maintain the hours required of the job?
- If the position requires it, is the candidate willing to disclose his or her HIV status?
- Is the candidate capable of following program policies and procedures (for example, confidentiality, sick leave, attendance, and promptness)?
- If the candidate is a program client, discuss in depth the role transition from client to staff member and identify the new expectations and boundaries that accompany this transition.

Action Step 10: Making an Offer

Once you have interviewed a consumer that is the right match for the job, handle the offer as you would any other staff position. Give the consumer a letter stating the employment offer, compensation amount, and other terms of employment. Be prepared for questions that the candidate may have prior to accepting the offer, and understand that this opportunity may be a joyful yet intimidating step for consumer staff. Congratulations to you both!

Advice from the Field: Hiring in the Spirit of "Offering Opportunity"

Keep in mind that hiring consumers is a way to not only meet a program's staffing needs, but it may also be a means of offering much needed work experience to consumers. Supervisors can support consumer staff members by encouraging them to seek higher level and higher compensated employment, either outside the program or within the program as employees improve their skills. See Section 5, Supervision and Support, for further information discussion on ways supervisors can support consumer staff members.

Advice from the Field: Hiring Youths—Know Your State Employment Laws and Regulations!

If you plan on hiring a youth who is under 18 years of age, be sure to research state labor laws for employing minors. Minors often require special work permits, parental consent, more structure at work, and closer supervision. You should check your organization's liability insurance to see if it covers under-age employees.

Read More About It!

The Importance of the Job Description

Brown, V.B., and Dooley, W. (2002). *Recruiting, Training and Maintaining Consumer Staff: Strategies Used and Lessons Learned*. Culver City, CA: Prototypes System Change Center.

HIV/AIDS Bureau. (2002). *HRSA Care ACTION: Positive Partners: Consumer Involvement in HIV CARE*. Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau.

HIV/AIDS Bureau. (2000). *People Living with HIV (PLWH) Sourcebook*. Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau.

Recruitment of PLWH as Consumer Staff Members

Brown, V.B., and Dooley, W. (2002). *Recruiting, Training and Maintaining Consumer Staff: Strategies Used and Lessons Learned*. Culver City, CA: Prototypes System Change Center.

Jeppson, E., and Thomas, J. (2001). *Getting Comfortable: Understanding the Ryan White CARE Act Planning Bodies*. Washington, DC: AIDS Alliance for Children, Youth and Families.

HIV/AIDS Bureau. (2003). *Positive Partnerships: Consumer Involvement in Ryan White CARE Act Programs.* Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau.

HIV/AIDS Bureau. (2002). *HRSA Care ACTION: Positive Partners: Consumer Involvement in HIV CARE*. Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau.

HIV/AIDS Bureau. (2000). *People Living with HIV (PLWH) Sourcebook*. Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau.

Hiring PLWH as Consumer Staff Members

Brown, V.B., and Dooley, W. (2002). *Recruiting, Training and Maintaining Consumer Staff: Strategies Used and Lessons Learned*. Culver City, CA: Prototypes System Change Center.

HIV/AIDS Bureau. (2002). *HRSA Care ACTION: Positive Partners: Consumer Involvement in HIV CARE*. Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau.

HIV/AIDS Bureau. (2000). *People Living with HIV (PLWH) Sourcebook*. Rockville, MD: U.S. Department of Health and Human Services, Health Resources and Services Administration, HIV/AIDS Bureau

Tools For Success 3.1
Before You Recruit

Prior to recruiting and hiring have you…

1. Evaluated the need for and understand the value of a new consumer staff member position.

   Strategy: Get the support of key administrators and program staff

2. Defined how consumer staff members will contribute to the program's services and how consumer staff members will compliment the existing staffing pattern.

   Strategy: Strongly consider obtaining consumer input in this planning process.

3. Readied the organization workplace for consumer staff employment.

   Strategy: This includes reviewing and revising policies such as reasonable accommodations, confidentiality and privacy, medical and family leave, alcohol and drug use, and family friendly workplace policies.

4. Developed a clear job description.

   Strategy: Identify the skills and what qualifications are needed to be successful at the job. Define the structure of the position including who supervises the position and the compensation and benefit structure.

5. Defined important characteristics that you would like the consumer staff members to possess. These may include:

   - Confidence in dealing with HIV and its treatment
   - Comfort with personal disclosure of HIV status
   - Willingness to learn more about HIV
   - Skill in articulating and understanding outreach to fellow consumers
   - Being stable in life, free of substance abuse issues
   - Having a strong support network
   - Other ____________________

Tools for Success 3.2
Justice Resource Institute, Inc.
JRI Health
Job Description

Position: Client Advocate (part time)

Qualifications: Knowledge of issues related to HIV/AIDS; familiarity with issues related to g/l/b/t youth, and youth with substance abuse histories. Experience working with ***M***en who have ***S***ex with ***M***en and/or people living with HIV/AIDS strongly preferred. People living with HIV/AIDS encouraged to apply.

Supervision: Client Advocate reports to the HIV Support Services program director.

Responsibilities: Responsibilities include the following:

- Serve as an initial point of contact for newly diagnosed and on-going HIV+ clients coming into care at JRI Health's Ryan White Title IV programs. Perform initial intake and assessment.
- Introduce and orient HIV+ young people to JRI Health programs, including primary care and mental health at the Borum Health Center, harm reduction and social services at the Wayne Wright Resource Center, partner notification and antibody testing at the Borum Health Center.
- Attend monthly clinical supervision, case management trainings, and other trainings on an ongoing basis as necessary.
- Provide client advocacy, housing advocacy, and administrative support to HIV+ clients.
- Maintain appropriate client boundaries.
- Other duties as assigned by the Coordinator of Ryan White Title IV.
- I acknowledge that I have received a copy of this job description and have had the opportunity to discuss it with my supervisor. There are no religious, psychological, or physical reasons preventing me from assuming these responsibilities.

I acknowledge that I have received a copy of this job description and have had the opportunity to discuss it with my supervisor. There are no religious, psychological, or physical reasons preventing me from assuming these responsibilities.

______________________________ ____________
Employee Date

______________________________ ____________
Supervisor Date

Tools for Success 3.3
Justice Resource Institute, Inc.
JRI Health
Job Description

Position: Community Health Specialist

Qualifications: High school diploma or GED required; some college strongly preferred. Ability to interact effectively with diverse populations required. Must be able to work in a team, to work with clients and to maintain appropriate boundaries. Bilingual strongly preferred. Experience working with Men who have Sex with Men (MSM) and/or transgender community strongly preferred. People living with HIV/AIDS strongly encouraged to apply. Fluent in Portuguese and/or Spanish strongly recommended.

Supervision: The Community Health Specialist reports to the Support Group Coordinator.

Responsibilities: Responsibilities include the following:

- Introduce and orient HIV+ young people to JRI Health programs, including primary care and mental health at the Borum Health Center, harm reduction and social services at the Wayne Wright Resource Center, partner notification and antibody testing at the Borum Health Center.
- Maintain and update client intake, release information, confidentiality, and supporting HIPPA documentation.
- Maintain and update outreach materials and packets for HIV+ clients.
- Conduct Online Outreach in accordance with the JRI Health Code of Conduct, and develop culturally competent outreach materials and social marketing initiatives.
- Receive client referrals and assist in the organizing of social events.
- Attend on-going trainings to acquire necessary facilitation and client advocacy skills.
- Co-facilitate POZ 20’s psychosocial support groups.
- Attend Wayne Wright Resource Center Team meeting.
- Provide administrative support for the JRI Health Consumer Advisory Board.
- Coordinate and submit nightly service delivery reports, attendance sheets, peer provider time sheets and facilitator’s reports.
- Work effectively as a part of a team.
- Maintain appropriate client boundaries.
- Other duties as assigned by supervisor.

I acknowledge that I have received a copy of this job description and have had the opportunity to discuss it with my supervisor. There are no religious, psychological, or physical reasons preventing me from assuming these responsibilities.

______________________________ ____________
Employee Date

______________________________ ____________
Supervisor Date

Tools for Success 3.4
Confidentiality Agreement

Applies to all UCSD Healthcare "workforce members" including: employees, medical staff and other health care professionals; volunteers; agency, temporary and registry personnel; and house staff, students, and interns (regardless of whether they are UCSD trainees or rotating through UCSD Healthcare facilities from another institution).

It is the responsibility of all UCSD Healthcare workforce members, as defined above, including employees, medical staff, house staff, students and volunteers, to preserve and protect confidential patient, employee and business information.

The Federal Health Insurance Portability Accountability Act (HIPAA) Privacy Law, the Confidentiality of Medical Information Act (California Civil Code § 56 et seq.) and the Lanterman-Petris-Short Act (California Welfare & Institutions Code § 5000 et seq.) govern the release of patient identifiable information by hospitals and other health care providers. The State Information Practice Act (California Civil Code sections 1798 et seq.) governs the acquisition and use of data that pertains to individuals. All of these laws establish protections to preserve the confidentiality of various medical and personal information and specify that such information may not be disclosed except as authorized by law or the patient or individual.

Confidential Patient Care Information includes: Any individually identifiable information in possession or derived from a provider of health care regarding a patient's medical history, mental, or physical condition or treatment, as well as the patients and/or their family members records, test results, conversations, research records and financial information. Examples include, but are not limited to:

Physical medical and psychiatric records including paper, photo, video, diagnostic and therapeutic reports, laboratory and pathology samples;

Patient insurance and billing records;

Mainframe and department based computerized patient data and alphanumeric radio pager messages;

Visual observations of patients receiving medical care or accessing services; and

Verbal information provided by or about the patient.

Confidential Employee and Business Information includes, but is not limited to, the following:

Employee home telephone number and address;

Spouse or other relative names;

Social Security number or income tax withholding records;

Information related to evaluation of performance;

Other such information obtained from the University's records which, if disclosed, would constitute an unwarranted invasion of privacy; or

Disclosure of Confidential business information that would cause harm to UCSD Healthcare.

Peer review and risk management activities and information are protected under California Evidence Code section 1157 and the attorney-client privilege.

I understand and acknowledge that:

I shall respect and maintain the confidentiality of all discussions, deliberations, patient care records and any other information generated with individual patient care, risk management and/or peer review activities.

It is my legal and ethical responsibility to protect the privacy, confidentiality and security of all medical records, proprietary information and other confidential information relating to UCSD Healthcare and its affiliates, including business, employment and medical information relating to our patients, members, employees and health care providers.

I shall only access or disseminate patient care information in the performance of my assigned duties and where required by or permitted by law, and in a manner which is consistent with officially adopted policies of UCSD Healthcare, or where no officially adopted policy exists, only with the express approval of my supervisor or designee. I shall make no voluntary disclosure of any discussion, deliberations, patient care records or any other patient care, peer review or risk management information, except to persons authorized to receive it in the conduct of UCSD Healthcare affairs.

UCSD Healthcare performs audits and reviews patient records in order to identify inappropriate access

My user ID is recorded when I access electronic records and that I am the only one authorized to use my user ID. Use of my user ID is my responsibility whether by me or anyone else. I will only access the minimum necessary information to satisfy my job role or the need of the request.

I agree to discuss confidential information only in the work place and only for job-related purposes and to not discuss such information outside of the work place or within hearing of other people who do not have a need to know about the information.

I understand that any and all references to HIV testing, such as any clinical test or laboratory test used to identify HIV, a component of HIV, or antibodies or antigens to HIV, are specifically protected under law and unauthorized release of confidential information may make me subject to legal and/or disciplinary action.

I understand that the law specifically protects psychiatric and drug abuse records, and that unauthorized release of such information may make me subject to legal and/or disciplinary action.

My obligation to safeguard patient confidentiality after my termination of employment with the University of California.

I hereby acknowledge that I have read and understand the foregoing information and that my signature below signifies my agreement to comply with the above terms. IN the event of a breach or threatened breach of the Confidentiality Agreement, I acknowledge that the University of California may, as applicable and as it deems appropriate, pursue disciplinary action up to and including termination from the University of California.

Print Name:	Signature:
Department:	Dated:

Routing: Please complete the form and return it your hiring department.

Confidentiality Statement

UCSD Mother, Child & Adolescent HIV Program
CARE Act Case Management Program
Confidentiality Statement

I have read the UCSD guidelines for the protection of client confidentiality.

I agree to follow these confidentiality guidelines.

I will report any violation of client confidentiality that I commit or observe to my supervisor.

I understand that any violation of the confidentiality policy will be reported to my supervisor, the UCSD Human Resources Department and the San Diego County HHSA agency.

______________________________ ________________

Name Date

Tools for Success 3.5
Interview Tool

To help the interviewer assess the interviewee's problem solving skills as well as assure their written and verbal communication skills, the interview should include:

Verbal situational issues—how would you handle this …

One of your clients has told you, confidentially, that they are not adhering to their medication regime, what do you do?

Written documentation exercises

You have just counseled a client about available SSI benefits, please document or chart the counseling session, including the advice that you provided the client.

Demonstration of presentation skills if necessary to the job

You have been asked to do a 10-minute presentation about high-risk practices for HIV disease. Please make the presentation. (You could modified this task by asking the applicant "how" they would prepare for the presentation what topics they would include in the presentation.)

Demonstration of computer/telephone skills if applicable to the job

To assess skills, create a scenario in which the applicant must design a short letter, enter data or display telephone manners.

Tools for Success 3.6
When Creating a Contractor Agreement …

Make sure you address the following issues:

- Confidentiality
- Discuss what it means to be a representative of the program
- Professionalism in regards to the program
- Organizational policies and procedures (that is, chain of command)
- Participation requirements (that is, attend meetings)
- The number of hours agreed upon at time of hiring
- Maintenance of accurate timesheets and follow procedures on submitting
- Respect of peers and staff
- Submission of reports and fulfill duties as assigned
- Understand that funds for a position may be subject to the discretion of annual grant reviews and funding awards.

The agreement should be signed by the program manager and contractor.

Section 4

Compensation and Benefits

"Consumers need to be compensated at a reasonable rate,
and they should have the opportunity
for growth and increased responsibility."

— a program coordinator

This project was funded by Health Resources and Services Administration, HIV/AIDS Bureau
Order # 02-0337P/ Purchase # 02-HAB-A223938 and # 03-HAB-A223938A to Circle Solutions, Inc.

Section 4
Compensation and Benefits

What to Expect in This Section

Developing appropriate and competitive compensation strategies requires an assessment of what is fair compensation for consumer staff positions as well as creative thinking about how to compensate consumer staff without jeopardizing their existing benefits. Allow for the consumer to be involved in this decision-making process as consumers may find it liberating to no longer be eligible for certain benefits and may be why a consumer is applying for a position. As Ryan White CARE Act (RWCA) programs design compensation strategies, the following action steps can help program directors devise fair and competitive compensation packages that both meet the needs of consumer staff members and allow the organization to recruit and maintain a qualified staff. To assist you in developing appropriate compensation and benefits, consider the following action steps to implementation.

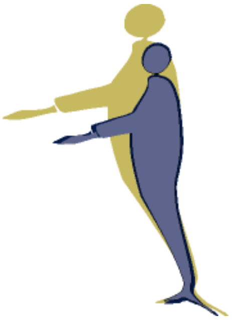
Action Step 1: Assess Comparable Salaries

Look Inside the Parent Organization

For some programs based in hospitals or academic institutions, the parent organization's compensation structure often sets the pay scale for positions. Compensation is usually based on factors such as:

- Education (for example, high school diploma or general equivalency degree [GED]; college degree; graduate degree)
- Years of experience in similar role
- Preferred qualifications (for example, language skills, computer skills)
- Amount of staffing resources approved in the program’s grant.

In larger organizations, the human resources/personnel department can be helpful in reviewing job descriptions and comparing consumer staff positions to other similar positions within the parent organization. Thus, the consumer staff position becomes "classified" (for example, health educator, outreach worker, case manager, program manager), and the established rate of pay is applied to the new position. As responsibilities are added, it may be possible to increase the rate of pay through a revision of the job description.



When developing consumer staff positions in such settings, you can save time and effort by making staff positions and job descriptions clearly comparable to other existing positions within your program. See Section 3, Recruiting and Hiring, for a discussion on creating job descriptions.

Look Within the Community at Large

For programs not affiliated with a larger parent organization, the challenge of selecting a salary range becomes a bit more complicated. Many programs review salaries for comparable positions within their community (city, county, region) to determine a competitive salary range. The salary is generally revisited at the time of the consumer employee's annual review, and some programs offer merit increases and/or cost-of-living raises as a means of retaining good employees. If comparable positions simply do not exist in your community, you should consider speaking with other RWCA programs to determine how they arrived at their salary ranges for these positions filled by consumers.

Action Step 2: Decide Between Salary or Fee-for-Service Compensation

Although many working people appreciate the predictability and built-in benefits (for example, sick time, vacation time) of salaried employment, the decision to work for a salary or on an hourly, fee-for-service basis, is more complex for PLWH and the programs that employ them.

Some programs structure employee compensation before hiring, whereas other programs encourage consumer staff members to make an informed choice regarding their employment status based on their own needs. Therefore, it is important to have a detailed discussion with consumer staff members about available benefits and eligibility.

A number of factors are important to consider as programs decide among the options for compensation of consumer staff members:

A full-time salary may jeopardize benefits available under federal Social Security Disability Insurance (SSDI).

- A full-time salary may affect some state entitlement programs that offer a critical safety net for individuals with a chronic health condition.
- Consumers who have access to these entitlements are often reluctant to risk losing these benefits because they were awarded to them only after a challenging qualification process.
- Income must be capped to ensure continued access to these entitlements.

Programs can work with consumer staff members to review each consumer employee’s unique situation and to understand how compensation can best be structured. Ideally, this review should occur in advance of the consumer accepting the staff position, although this can also be addressed once consumers have been hired but before they start work.

Advice from the Field: Salary Ranges

Hourly equivalents vary widely across the country, from a low of $6.00 per hour to a high of $21.00 per hour, based on a mix of job responsibilities (line staff versus managerial positions) and local cost of living. RWCA programs that carefully assess comparable salaries do not vary the salary based on whether the employee is a consumer staff member or a nonconsumer staff member. It is important to compensate consumer staff members comparably with any other staff member who brings the same skills and experience to the position.

Tools for Success

Tools for Success 4.1, Consumer Consultant Benefit Options, provides an example of this program’s approach.

Action Step 3: Think Creatively About Compensation

Many RWCA programs have been extremely creative in tailoring compensation strategies to enhance their capacity to hire and support consumer staff members in a variety of roles. Here are three approaches:

- **Job sharing.** This can be an attractive option for working parents or those managing their own medical problems or those of their child(ren). The reduced number of working hours will also protect entitlement benefits.
- **An hourly rate.** An hourly rate, up to the maximum permissible under the entitlement, can be an option. Programs can invite consumer staff members to volunteer additional hours to ensure that all staffing needs are met.
- **Vouchers and gift certificates.** Redeemable for groceries, personal care items, or other "necessities of life," vouchers or gift certificates are an attractive form of compensation for part-time, short-term work such as:
  - Staffing a table at a community health fair
  - Helping with a conference or training session
  - Reviewing and offering feedback on program materials
  - Participating in a focus group or a community-planning group.

Vouchers will not jeopardize income caps for health insurance entitlements. Vouchers can be donated by local merchants as well as by large chain stores, and they can be used to compensate for a specific hourly rate, such as an equivalent to $10 per hour of work time and/or work-related expenses. If you decide to use vouchers or gift certificates, be sure to develop a voucher policy and design a way to account for their distribution.

Remember, RWCA grant funds cannot be used to pay for vouchers!

Action Step 4: Offer Benefits to Consumer Staff Members

Employee benefits can include a variety of offerings. The benefit that is most important for many consumer staff members who are not receiving SSDI is health insurance. Although some programs do not offer health insurance for part-time/consultant positions, health insurance benefits are sometimes available to consumer employees working 50 percent or more time in a salaried position. Full health insurance benefits are generally available to those working 75 percent time or more.

It is important that consumer staff members and their supervisor(s) review all medical insurance options to understand:

Advice from the Field: Create Part-Time or Consulting Options

One response to income caps is to offer part-time, salaried employment, with a prorated reduction in income to consumer staff members. Another option is to develop consumer staff positions as contractual, fee-for-service or hourly positions. This latter approach:

- Reduces concern about jeopardizing existing health benefits
- Offers consumers more flexibility to address personal needs such as childcare and medical appointments
- Makes it possible for consumers to work in settings with limited sick leave policies
- May open the possibility of offering a higher rate of pay or relax organizational qualifications for salaried positions (for example, a high school diploma or GED), allowing programs to hire consumers with promising skills who do not meet organizational criteria for employment.

Important note: If you choose to pay consumer staff members as consultants, do not forget to remind them that federal and state taxes will be their responsibility.

- If a medical insurance plan requires a waiting period for preexisting conditions (in this case, HIV disease or AIDS) and, if so, the length of that waiting period.
- Whether the choice of a particular health maintenance organization (HMO) or preferred provider organization (PPO) will prevent the consumer from continuing to receive care from his or her current medical team.

In addition to medical insurance, basic benefit packages generally include:

- Paid holidays
- Personal days
- Sick time
- Vacation time.

Rounding out the benefit package are some or all of the following:

- Dental insurance
- Short-term disability insurance
- Long-term disability insurance
- Life insurance
- Retirement benefits.

These additional benefits often make staff positions even more appealing to consumers.

Action Step 5: Think Creatively About Benefits

Although many programs experience limitations in their ability to offer monetary compensation to consumer staff members—based on budgetary constraints, organizational pay scales, or income caps on consumer entitlements—many programs have found creative ways of making positions more attractive to potential consumer employees and consultants. These include:

- Providing childcare or transportation at no cost to the employee or consultant
- Paying consumer staff members for time spent in meetings outside the workplace
- Paying consumer staff members who are receiving on-site medical or mental health care for time spent receiving these services (as a health promotion incentive)
- Offering generous vacation benefits to reduce stress as well as compensate for reduced income
- Providing access to employee assistance programs (EAPs)
- Offering discounts to movie theaters, stage performances, concerts, and local theme parks

Advice from the Field: Mixing Paid Compensation with Volunteer Time

In one program, peer advocates are paid for 10 hours of work per week at their regular rate of pay and are asked to volunteer for another 10 hours of work. Six peers currently fill these 20 hours- per- week positions, providing the program with twice the number of hours of service weekly than the program was able to budget for originally and allowing the organization to increase the number of positions available to consumers.

- Providing an opportunity to attend out-of-town meetings and training conferences with all expenses paid
- Encouraging and supporting staff members without a high school diploma as they work on obtaining a GED
- Offering free tuition for coursework toward an undergraduate degree.

Programs can benefit by using creative ways to attract staff and consumer staff members are often pleased that they do!

Tools for Success

See Tools for Success 4.2, Assessing Your Benefits Package: Questions and Solutions, and Tools for Success 4.3, Chart Your Benefit Options, to plan your comprehensive benefits package.

Read More About It!

Brooks, R.A., and Klosinski, L.E. (1999). Assisting Persons Living with HIV/AIDS to Return to Work: Programmatic Steps for AIDS Service Organizations. *AIDS Education and Prevention,* 11(3):212–223.

Brown, V.B., and Dooley, W. (2002). *Recruiting, Training and Maintaining Consumer Staff: Strategies Used and Lessons Learned*. Culver City, CA: Prototypes System Change Center.

Jeppson, E., and Thomas, J. (2001). *Getting Comfortable: Understanding the Ryan White CARE Act Planning Bodies*. Washington, DC: AIDS Alliance for Children, Youth and Families.

McReynolds, C.J. (2001). The Meaning of Work in the Lives of People Living with HIV Disease and AIDS. *Rehabilitation Counseling Bulletin,* 44:104–115

Tools For Success 4.1

Consumer Consultant Benefit Options: Children's Diagnostic and Treatment Center (CDTC)

<table>
<tr><th>Benefit</th><th></th></tr>
<tr><td>Salary Range</td><td>$7.00–$9.00 per hour</td></tr>
<tr><td>Salary Increases</td><td>Annually, based on merit evaluation</td></tr>
<tr><td>Hours per week</td><td>10-40 depending on grant funding available</td></tr>
<tr><td>Personal/Sick Time</td><td>After 6 months of employment, staff will receive personal/sick time equivalent to the average hours worked weekly.
<table>
<tr><td>Average hours worked per week</td><td>Personal/sick time earned</td></tr>
<tr><td>20 hours</td><td>20 hours</td></tr>
<tr><td>30 hours</td><td>30 hours</td></tr>
<tr><td>40 hours</td><td>40 hours</td></tr>
</table>
This bank is not available to be rolled into the next fiscal year.</td></tr>
<tr><td>Travel on CDTC Business</td><td>Reimbursed at 8 hours per day.</td></tr>
<tr><td>Child Care</td><td>Available at $50.00 per day if traveling out of state on Center Business.</td></tr>
<tr><td>Mileage Reimbursement</td><td>Yes, dependent on grant</td></tr>
<tr><td>Beepers</td><td>If needed for position, yes. $50.00 replacement fee.</td></tr>
<tr><td>FOB's</td><td>If needed for the position and location, yes. $15.00 replacement fee.</td></tr>
<tr><td>Parking Decal</td><td>Yes</td></tr>
<tr><td>Computers</td><td>Yes, not networked to the District Facility</td></tr>
<tr><td colspan="2">STAFF ELIGIBLE & RECEIVING CDTC SERVICES FROM CFAP PROGRAM</td></tr>
<tr><td>Medical Care</td><td>Advocates that meet CDTC requirements are eligible for medical care. Subject to meeting program eligibility requirements such as residency, insurance status, financial eligibility, and health status.</td></tr>
<tr><td>Case Management</td><td>Advocates that are enrolled in the CFAP program are eligible for Case Management services at CDTC. All eligibility requirements of the program must be met. One Social Service Worker will be assigned to all Consumer Consultants.</td></tr>
<tr><td>Clothing</td><td>Yes, via case manager</td></tr>
<tr><td>Bus Passes</td><td>Yes, via case manager</td></tr>
<tr><td>Food Assistance</td><td>Yes, via case manager</td></tr>
<tr><td>Emergency Assistance</td><td>Yes, via case manager</td></tr>
<tr><td>Holiday Assistance</td><td>Yes, via case manager. Families are prioritized; neediest clients are serviced prior to consultant staff.</td></tr>
</table>

Tools for Success 4.2
Assessing Your Benefits Package: Questions and Solutions

Question: Are your organization's sick leave policies inadequate to support consumer employees who may face illness more often than others in your organization?

Solution: Consider allowing employees to donate their unused sick time into a pool that may be utilized by consumer staff or others who are facing health problems that prevent them from working.

Question: Do consumer staff members work on a fee-for-service basis or too few salaried hours to qualify for organizational health benefits?

Solution: Remember that these consumer staff may still be eligible to participate in Ryan White-funded entitlements (for example, ADAP, dental reimbursement). Check with local income guidelines, as they vary. Make sure you have a conversation regarding benefits and eligibility with both Human Resources/Personnel staff and the prospective new employee prior to hiring.

Question: Does your state extend Medicaid benefits to people who are HIV-positive as well as those with AIDS?

Solution: If you're not sure, call your local Medicaid office to find out. By offering less-than-full-time employment with consequent lower salaries, you may afford consumer employees the ability to obtain or retain this important health benefit.

Question: Does your state offer an AIDS Insurance Continuation Program (AICP)?

Solution: This program helps those who cannot afford to maintain their private insurance coverage from a previous employer. The benefit is income-based, and if the individual qualifies, the program will pay a portion of his or her medical insurance (and your organization could, ideally, pay some or all of the remainder). Programs of this type will fill the gap in coverage if your organization's health plan imposes a waiting period for pre-existing conditions.

Question: Does travel present a barrier for employees on the lower end of the salary scale?

Solution: If travel advances are not possible or hard to obtain within your organization, find ways to assist consumer staff members to advance travel expenses. Strategies can include obtaining and using an organizational credit card, enlisting higher paid staff who accompany consumer staff in their travels to cover reimbursable expenses for the consumer staff member.

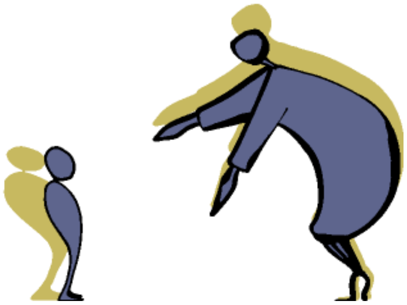
Tools for Success 4.3
Chart Your Benefit Options

Type of Benefit	**Have Policy**	**Who Could Provide**	**Who Needs To Approve**	**Cost or Value**
Childcare transportation				
Pay for meetings outside the workplace				
Payment for health/mental health services				
Generous vacation benefits/sick leave pool				
Access to Employee Assistance Program				
Discounts to community events				
Covering all travel/meeting expenses				
Time off to attend GED classes				
Tuition reimbursement				
Other:				

Section 5

Supervision and Support

> *"In the planning process you can never plan enough for how you will supervise."*
>
> *— a program coordinator*



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Section 5:
Supervision and Support

What to Expect in This Section

One of the most important influences for the success of consumer staff members is their relationship with their supervisor. This key individual is responsible for providing feedback, information, guidance, and support to consumer staff members and holding them accountable to the program. Good supervisors help consumer staff members identify and achieve professional and developmental goals.

The supervisor is not only a role model for consumer staff members, but also for other staff, who often take their cues from the supervisor when determining how to interact with and integrate new consumer staff members into a program or organization. When there are issues with other staff members that the consumer staff person cannot work out or may need some coaching to resolve, it is the responsibility of the supervisor to intervene.

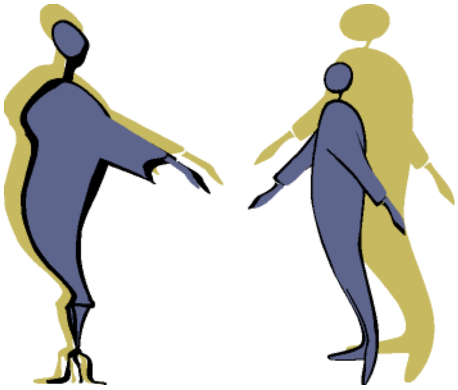
Employee satisfaction is most influenced by the relationship the staff person has with his or her supervisor. Because of the unique needs of consumer staff members working in Ryan White CARE Act (RWCA) programs, knowing how to select, prepare and support supervisors is critical to the success of your consumer staff members and your program.

Who Should Supervise: Selecting, Preparing, and Supporting Supervisors

Selecting the Right Supervisor

Because the supervisor is so important to the success of consumer staff members, it is crucial to select an individual who has:

- Credibility with and the respect of consumer staff members, other program staff members, and key administrators
- An understanding of and support for the policies and procedures of the program as well as the parent organization
- Strong interpersonal communication and negotiation skills
- An understanding of the challenges facing consumers as they transition to staff positions
- The time to dedicate to supervisory functions as well as ongoing supervisory training



- The desire to supervise consumer staff members and a strong belief in the value they bring to the program
- The commitment to helping consumer staff members succeed.

Preparing and Supporting Supervisors: Action Steps to Implementation

Here are some action steps to help prepare and support supervisors:

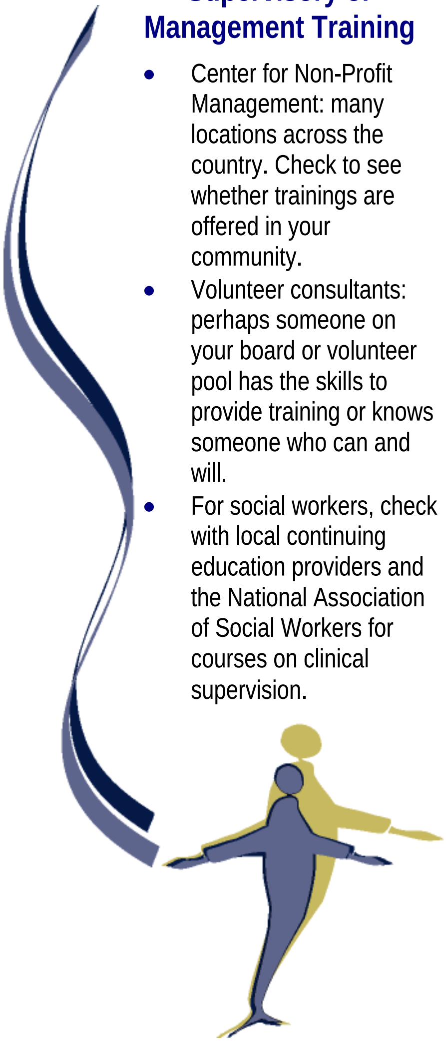
- **Action Step 1.** Review the prospective supervisor's current job responsibilities and workload. If there are adjustments that need to be made, such as reducing or transferring certain job responsibilities, make sure that adjustments are completed before the supervisors assumes new supervisory tasks.
- **Action Step 2.** Make sure you have the support from other staff members who may have to take on some of the prospective supervisor's former responsibilities or workload.
- **Action Step 3.** Estimate the additional hours required to supervise and support new consumer staff members, especially during the first 3 months of their employment. Do not be conservative! If you overestimate, you will be happy to get back that time.
- **Action Step 4.** If warranted, adjust the prospective supervisor's job classification and compensation, making sure funding is available to do so.
- **Action Step 5.** Discuss, anticipate, and develop strategies, policies and procedures to address the dual roles the prospective supervisor would have to manage, especially if the prospective supervisor already has a service provider relationship with the incoming consumer staff member he or she will supervise or with the clients the consumer staff member will see.
- **Action Step 6.** Provide needed supervision training and development opportunities. Some programs require social worker supervisors to attend state-mandated training for the supervision of non-licensed social workers and/or field instructor training. The additional clinical perspective of these social work training sessions may help supervisors more effectively manage their own and their supervisees' multiple roles and boundaries. Explore training and educational opportunities that may be available within the parent organization, the community, the state, or at the national level.
- **Action Step 7.** Explore the possibility of outside consultation for supervisors. Some programs offer consumer staff members' supervisors, especially those with no previous supervisory experience, the ability to obtain consultation from colleagues or an off-site consultant to help them more effectively address their transition from consumer service provider to consumer staff member supervisor. Such consultation provides additional quality control and accountability. Programs that have more than one consumer

Tools for Success

Tools for Success 5.1, Checklist for Preparing Supervisors, will help you prepare supervisors for their role in supporting consumer staff members.

Advice from the Field: Some Thoughts About Affordable Supervisory or Management Training

- Center for Non-Profit Management: many locations across the country. Check to see whether trainings are offered in your community.
- Volunteer consultants: perhaps someone on your board or volunteer pool has the skills to provide training or knows someone who can and will.
- For social workers, check with local continuing education providers and the National Association of Social Workers for courses on clinical supervision.



staff member supervisor may wish to consider establishing regular, ongoing support groups for supervisors—thus, giving supervisors a way to learn from each other.

- **Action Step 8.** Be willing to renegotiate supervisor and consumer staff members' job responsibilities, expectations, and workload over time and as individuals and the program learn from the experience.
- **Action Step 9.** Decide how, when, and how often to provide formal performance reviews.

Know Your Supervisory Challenges

Consumer staff members' supervisors must be prepared to devote considerable time and address a range of complex personnel issues, including:

- **Limited job experience, education, and skills of consumer staff members.** Inexperience in the work environment can contribute to uneasiness with the formality and complexity of the work environment as well as expectations regarding professional behavior and work ethic.
- **Difficulty transitioning from consumer of services to consumer staff member.** The challenge of making this transition may result in boundaries becoming unclear between the new consumer staff members, other consumer clients, and program staff members. It is important that these issues be addressed early in the recruiting and hiring process, reinforced by organizational policies, and reiterated during training of all staff members.
- **The multiple demands on consumer staff member's time.** Consumer staff members must manage to effectively work within the program constraints and fulfill their job responsibilities. Simultaneously, they must manage their own health care and the needs of their families. These conversations are more appropriate with the clinical supervisor rather than the administrative supervisor, thus reducing confusion to consumer staff members as they transition from being clients.
- **Disclosure, confidentiality, and reasonable accommodation.** Disclosing HIV status, the confidentiality of medical information, and issues related to accommodation are among the greatest concerns of those entering the workforce.
- **Special issues for youth consumer staff members.** For youths, supervisors need to be aware of developmental issues such as the importance of fitting into one's peer group and developing one's sexual identity. Many youth programs note that HIV disclosure is more difficult for youth workers. Many youth consumer staff members want to lead a "normal" life in order to feel more accepted by their non-HIV peer group. For many youths, becoming a consumer staff member is their first

Advice from the Field: Performance Reviews

The key to identifying performance gaps and training needs and ensuring that consumer staff members receive the developmental feedback they need to succeed is providing good regularly scheduled performance reviews. Reviews are most helpful if:

- Consumer staff members and their supervisors mutually develop clear measurable goals and objectives and a plan for achieving them.
- Reviews do not preclude informal coaching, mentoring, and feedback between reviews.
- Supervisors provide regular feedback and opportunities to discuss consumer staff members' progress between formal performance evaluations.
- Conducted within the first 3 and 6 months of employment and annually, after that.
- Programs provide more intensive supervision during the orientation probation period, which facilitates faster learning and a smoother transition for consumers into their new staff role.

job experience, and they need to learn basic job skills and expectations while on the job.

Quality Supervision: What It Looks Like and How to Do It

Quality supervision is an ongoing process that promotes open communication and timely two-way feedback between the supervisor and consumer staff members. Although programs need to be able to make reasonable accommodations for the special needs of consumer staff members, it is critical to otherwise hold consumer staff members to the same standards as other program staff members.

RWCA programs can use a variety of approaches to supervising consumer staff members, based partially on the resources available to the program. Some of these approaches are:

- **Intensive individual supervision.** Provide more intensive individual supervision during the first 3 months of employment to facilitate consumer staff members' orientation and integration into the program. This added time can be important in building solid relationships between supervisor and supervisee; clarifying expectations, roles, responsibilities, and boundaries; being more available for questions, guidance, and support; and teaching new staff members how to use supervision.
- **Individual and group supervision.** Provide a combination of individual and group supervision, the most common model being weekly individual supervision and monthly group meetings. Monthly group meetings range from case conferences to off-site support meetings facilitated by a consultant. Depending on the needs of consumer staff members and program resources, supervision frequency can be weekly, biweekly, monthly, as needed, or tailored to meet an individual consumer staff member's needs.
- **Separate clinical and administrative supervisory functions.** Ideally, the consumer staff member's supervisor would not provide any direct client services in order to separate the supervisory role from that of service provider to consumer staff members and/or their clients. Thus, programs need to explore ways in which they can support a dedicated supervisory position, either full-time or part-time. Staffing options may include the following steps:
  - Identify an individual from the program or parent organization who can provide clinical services to consumer staff members, thus separating clinical services from administrative supervision.
  - Identify a consultant who may be able to provide clinical services for consumer staff members.

Advice from the Field: Anticipate Potential Supervisory Challenges

One criterion that many programs use in selecting consumers to fill peer advocate positions is how well clients advocate on their own behalf. What programs may not anticipate is that consumer staff members (more likely those with little or no previous work experience) sometimes take an activist approach in their initial interactions with their co-workers. This may lead to conflicts and tension. Supervisors may want to strategize with consumer staff members about how to provide information and feedback to their co-workers while also demonstrating the kind of respect that they expect. Supervisors must work with consumer staff members to develop ways to approach their co-workers and to recognize when it is appropriate to be an activist.

  - Consider hiring an administrative supervisor who could also serve in another administrative capacity (especially if your budget is limited).
  - Explore a variety of supervisory options; RWCA programs may be able to consider a variety of strategies to address different aspects of supervision.
- Programs may be able to offer three levels of supervision:
  - Individual administrative supervision with the program coordinator
  - Weekly individual sessions with the clinical services director for those with client involvement
  - Weekly team case conference meetings.
- Programs may assign a program coordinator to provide administrative supervision and a clinician to provide intensive weekly individual time with clients.
- Programs may also like to coordinate a monthly group session for consumer staff members facilitated by either a supervisor from the program or a consultant.

Supervisory Responsibilities: Creating a Supportive Environment

Creating a supportive workplace environment is one of the most importing tasks of a supervisor. Here are some ways to create a supportive and inclusive workplace:

- Schedule staff meetings and case conferences so that consumer staff members can attend and then actively involve them in meeting discussions by seeking their opinions.
- Encourage and support consumer staff members' participation in annual staff retreats and program planning meetings.
- Actively listen to consumer staff members input and acknowledge what they have to say. Let them know that you value their input.
- Include consumer staff members in planning and implementing program events.
- Identify clear roles consumer staff members can play that contribute to the program's goals.
- Elicit and incorporate consumer staff members input into the development and evolution of their job descriptions.
- Provide a staffing structure that allows flexibility, growth, leadership development, and promotional opportunities.
- Treat consumer staff members as you would other staff members and hold them accountable—do not lower your standards for them.
- Create a safe, family-friendly work environment.

Advice from the Field: Balancing Disclosure and Confidentiality

Although HIV status may be "out in the open," the confidentiality of client information remains a concern among program staff. Consumer staff members often need to balance the disclosure of their own HIV status and confidentiality issues, as well as the confidentiality of their clients.

Tools for Success

See Tools for Success 5.2, The "How To" of Supervisory Basics, to learn more about supervisory styles.

- Set aside development funds for consumer staff members and help them obtain scholarships to attend out-of-area conferences and trainings.
- Provide on-site support group meetings and counseling for consumer staff members or allow them to attend off-site support groups and/or counseling sessions during paid work time.
- If you have access to employee assistance programs, allow consumer staff members to use these services.
- Design formal and informal coaching, mentoring, and support around time and stress management.

Supervisory Basics

Now that you have selected the right supervisor and decided on how to structure your supervision, here are some supervisory basics to share with your program supervisors:

- Be flexible
- Be consistent
- Develop an open communication style
- Demonstrate your willingness to understand and support your consumer staff members
- Provide guidance to your consumer staff members regarding their roles, responsibilities, and expectations
- Demonstrate commitment to staff development.

Learn More About It!

Want to know how consumer staff members really feel about your program and how clients feel about working with consumer advocates?

The Comprehensive Family AIDS Program, Children's Diagnostic and Treatment Center, in Fort Lauderdale, Florida, has conducted job satisfaction surveys of its consumer staff members. Results have led to improved consumer staff member programs. For more information, contact Marie Brown Hayes, 954-728-1082.

The University of California, San Diego, Mother, Child, and Adolescent HIV Program, surveys clients who work with consumer staff members. The survey asks clients for feedback on consumer staff members' helpfulness, accessibility, and overall service quality, as well as clients what they like most about working with their peer advocate and what changes are needed to improve the peer advocacy program. For more information, contact Mary Caffery, 619-543-8080, extension 236; mcaffery@ucsd.edu.

Do not forget to conduct exit interviews for departing consumer staff members. Sometimes exit interviews provide more candid feedback that can lead to program improvements. JRI Health of the Justice Resource Institute in Boston, Massachusetts, conducts a structured, face-to-face exit interview with all employees who leave voluntarily.

Tools for Success 5.1
Checklist for Preparing Supervisors

You have …

- Reviewed the prospective supervisor's current job responsibilities and workload.
- Estimated the additional hours required to supervise and support new consumer staff members, especially the first 3 months of their employment—don't be conservative.
- Made adjustments to the prospective supervisor's job responsibilities and workload to accommodate supervising consumer staff and get buy-in from other staff who may have to take on some of the prospective supervisor's former responsibilities or workload.
- Adjusted the prospective consumer staff supervisor's job classification and compensation, making sure funding is available to do so.
- Discussed, anticipated and developed strategies, policies and procedures to address the dual roles the prospective supervisor would have to manage, especially if the prospective supervisor already has a service provider relationship with incoming consumer staff he or she will supervise or clients they will see.
- Provided needed supervision training and development opportunities.
- Considered re-negotiating supervisor and consumer staff job responsibilities, expectations and workload over time and as individuals and the program learn from the experience.
- Explored the possibility of outside consultation for supervisors.
- Decided how, when and how often to provide formal performance evaluations.

Tools for Success 5.2

The "How To" of Supervisory Basics

How do you measure up as a supervisor? Are you …

Flexible

- Use flex schedules to accommodate medical appointments, transportation issues, and family and personal needs.
- Try different approaches with consumer staff members and be receptive to their suggestions.

Consistent

- Maintain regularly scheduled appointments with consumer staff, especially new hires.
- Follow-through—do what you say you will because it helps build trust.
- Apply organizational policies and procedures consistently for all staff.
- Hold consumer staff accountable as you would other program staff.

Open in Your Communication Style

- Create and maintain a safe environment to discuss issues.
- Encourage and model two-way feedback.
- Check-in rather than assume you know what supervisees need, feel, and want.
- Don't be afraid to confront consumer staff members when you have concerns.
- Be willing and able to have conversations about challenging issues such as confidentiality, boundaries with staff and clients, over-involvement with clients, or burnout.
- Share some of your own feelings, perspectives, and experiences to help normalize their experience and to model the kind of communication you want from them.

Understanding and Supportive

- Understand and respect cultural differences and diversity as they impact the supervisee and supervisor relationship as well as consumer staff members' work with clients and other staff. This can be particularly true for substance using clients/consumers regardless of race, ethnicity, gender, or sexual orientation. It is essential to have a supervisory structure in place that understands a consumer staff members' input and perspective in working with group of peers.
- Be aware of and help consumer staff members manage their unique stressors—spending more time, as one consumer staff members put it, "in HIV world," watching peer clients become more ill, over-identifying with clients, disclosure issues and changing relationships with staff and clients.
- Reassure consumer staff members that their first priority is to take care of themselves and their families and then take care of work. Remind them that they can take better care of their clients if they first take good care of themselves.
- Before jumping to conclusions, always give them an opportunity to present their perspective.
- Remember the old supervisory saying: "They will never know you care unless you show them that you care!"

Providing Guidance and Support

- Help clarify job roles, responsibilities, and expectations. Explain the goals and objectives of your program and how consumer staff members' jobs contribute to achieving program goals. Go over how consumer staff members' responsibilities interface with other staff roles. Consumer staff members need to know where they fit into the program.
- Provide concrete examples of what crossing the line looks like so they know how to set limits and maintain clear boundaries. Let them know what the immediate and long-term consequences are to themselves, clients and the program if they overstep their designated roles.
- For those with less job experience, you may need to clarify workplace expectations. For example, does being on time mean exactly on time or within 15 minutes of one's scheduled start time?
- Educate consumer staff members how to use supervision. Clearly explain what you expect from them during supervision sessions.
- Help consumer staff members learn how to set limits. Let them know why this is important and what the impact is on clients, themselves and the program if they become overly involved or too available to their clients.
- Hold consumer staff members accountable, just like you would other staff.
- Teach consumer staff members how to document and how to handle client records. Make sure they have the literacy skills to document properly.
- Role model what you want, whether it is an explicit demonstration of how to switch from one role to another (that is, service provider to supervisor, client to employee) or working reasonable hours yourself to demonstrate a healthy work life balance
- Role-play new or challenging situations, such as shifting roles, creating new boundaries, talking to someone while maintaining confidentiality.
- Take the initiative in providing informal coaching and mentoring outside of regularly scheduled supervision. Encourage other staff to do likewise.

Demonstrating a Commitment to Staff Development

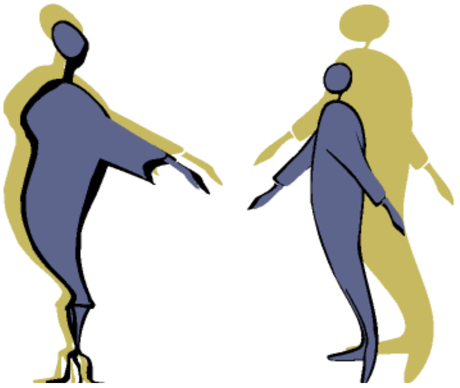
- Work with consumer staff members to identify their development needs and goals.
- Identify consumer staff members' strengths and assets and build on them. This includes leveraging their diversity.
- Give timely, specific, and regular feedback.
- Encourage staff to move out of their comfort zone, realize their full potential, and move further up or along the organization's structure and provide training in order for this to take place.
- Recognize accomplishments privately and if appropriate, publicly
- Resist the urge to micromanage. Allow staff leeway to try new things and make some mistakes, monitor closely, then be available to talk about learn from their experiences.
- Encourage staff to attend conferences, training, and other development activities. If necessary, arrange back-up coverage for their clients while they are gone.
- If there are no promotional opportunities within the program and consumer staff members want more than your program can offer, help them prepare for and find other job opportunities, even if it means losing them to other organizations.

Section 6

Professional Development

“Training is the key to empowerment and to
the promotion of consumer staff ...
as much interdisciplinary training as possible.”

— a program coordinator



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Section 6: Professional Development

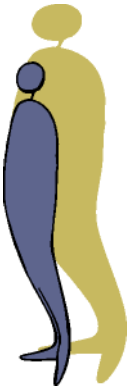
What to Expect in This Section

Professional development is a continuous process that begins on the first day of employment. This section guides you from the steps of the first orientation of the new consumer staff member through creating innovative ongoing training and educational opportunities. Remember, in some cases, this may be a consumer's first employment experience, so "the basics" should not be overlooked by any organization prepared to hire and support these new job seekers. To assist you in planning for professional development, consider the following action steps to implementation.

Action Step 1: Implement a General Staff Orientation

Orientation practices will vary from program to program; however, you should consider including the following elements in your orientation plan:

- **Organizational policies and procedures, including:**
    - Rules of conduct, including anti-discrimination and sexual harassment policies
    - Employee compensation, benefits, performance review, and termination procedures
    - Confidentiality policies and practices, including the signing of a confidentiality agreement
    - Receipt of an employee handbook or personnel policy manual
    - Review of core personnel policies and procedure (for example, confidentiality, sexual harassment policy, staff grievance procedures, time sheets, benefits, paid holidays, sick time, vacation time)
    - A tour of the facilities
- **Orientation to the program, including:**
    - Review of program history, services, service sites, and staffing
    - An introduction to all other program staff members at all program locations, including discussion of how the new employee will interact with each of these staff members



    - A tour of the physical work space (for example, alarm systems, location and use of office equipment, fire exits, fire extinguishers)
    - An orientation to technical systems (for example, telephones, voicemail, computer access)
    - A review of job responsibilities and expectations
    - Overview of program policies and procedures, including defining and reporting critical incidents, safety-related guidelines and protocols, and client grievance procedures
    - Program fiscal information (for example, sources of program funding, data collection procedures)
    - Review of peer support standards of care for your community
    - Review of community and online resources
    - Overview of and a visit to other HIV-related programs in the organization (if applicable)
    - Overview of and a visit to non-HIV-related programs in the organization (if applicable)
    - Overview of and a visit to other HIV-related programs in the service region (if applicable), particularly if referrals will be made to these programs
- **“Shadowing” of staff members who perform similar job functions.** This technique is a great way for experienced employees to model professional behavior in areas such as answering the telephone, completing a time sheet, recording program data, and interacting with consumers seeking program services.

Action Step 2: Provide Opportunities to Enhance Essential Workplace Skills

Consumer staff members may have had little or no prior professional work experience. There are a number of workplace skills that can be emphasized early during training and revisited any number of times as employment continues:

- How to work in a professional setting, including:
    - Self-presentation (for example, dress, attitude, performance)
    - Telephone etiquette
    - Controlling rumors and gossip
    - Managing personal problems
    - Reducing tardiness
    - Not lending money to clients
    - How to participate in or facilitate a meeting.
- Reading and writing skills

Advice from the Field: Being Creative About Orientation

Question: Not sure whether a new employee (particularly a part-time employee) has completed all orientation components?

Advice: Develop a checklist so that staff members responsible for specific components of the orientation protocol, as well as the new employee, can sign and date the checklist as various topic areas are completed. Keep one copy in the employee’s personnel file and give a second copy to the new employee for his or her own records.

Need help? One resource is Troix Bettencourt at troixb@hotmail.com or 978-455-4021 or 617-285-7633.

Question: Want to develop a handbook for orientation?

Advice: An orientation handbook could cover topics such as how to answer the telephone, documentation procedures, and the different forms staff members need to know how to fill out (consent forms, release forms, outreach forms).

Need help? One resource is Michelle Smith, Social Service Coordinator for Jefferson Comprehensive Care System, Inc., in Pine Bluff, Arkansas (870-534-3448, extension106; smith9x@aol.com).

- Computer literacy
- Leadership skills
- Public speaking skills
- Organizational skills or time management skills
- Stress management and avoiding burnout.

Action Step 3: Address Specific Job-Related Skills

Some aspects of training will vary based on job responsibilities, consumer staff members will benefit from attending in-house, statewide, or regional training programs on such topics as:

- HIV, tuberculosis, and hepatitis C progression and treatment
- Overview of the Ryan White CARE Act, funding, and available services
- Case management issues, roles, responsibilities, and self-care
- Advocacy skills and self-care
- Setting appropriate boundaries and managing dual roles
- Coordinating peer advocacy and case management
- Client rights and responsibilities
- Client interviewing and documentation
- Ethics and professional conduct, consumer confidentiality, contract compliance
- Compliance with Health Insurance Portability and Accountability Act of 1996
- HIV-related psychosocial issues
- Mental health, substance abuse, and crisis intervention
- Permanency planning, foster care, and adoption
- Cultural diversity and sensitivity (including gender, race, ethnicity, sexual orientation, religious affiliation, disability)
- Special concerns of women living with HIV
- Local resources, accessing benefits, and legal issues
- How to live with HIV and secondary prevention (that is, limiting the progression of HIV disease in individuals who are already infected)
- HIV prevention education (including “positive prevention”)
- HIV research and clinical trials
- Adolescent development
- Outreach and case finding
- Personal safety (particularly for work done in the streets or in clients’ homes)
- Interviewing, counseling, and providing emotional support
- Support group facilitation

Tools for Success

See Tools for Success 6.2, Assessing Training Needs, for a checklist to help you chart the training needs of your staff.

Tools for Success

See Tools for Success 6.3, Special Topics Training Assessment, to help you determine the additional training needs of your program staff members.

- Anti-retroviral therapy adherence
- Culturally competent care
- Alternative approaches to care
- How to read a tuberculosis test
- How to conduct a survey
- How to read and use research and evaluation data.

Action Step 4: Design Innovation and Practical Training Opportunities

Some consumers will benefit from additional support and recognition as they proceed through their orientation to and training within the program. Here are some ideas to consider:

- **Buddy system.** Partner new consumer staff members with a "buddy"—either a more experienced consumer staff member or a resource person on the staff—to whom they can go for help in navigating the organization or who can introduce them to staff at partner agencies in the community with whom they will work. This individual "buddy" can also provide feedback to the program coordinator about how the new employee is managing his or her new role.
- **Regular meetings.** Schedule regular meetings for consumer employees and other staff who work closely with them, especially during the first six months of employment. These meetings will allow the "group" to mentor the new employee and, as a by-product of such close contact, have the potential to increase organizational investment in the new employee.
- **Create interactive training exercises.** Although some consumer staff members may be new to the professional working world, it is critical for trainers working with *all* incoming staff to demonstrate respect for the skills and life experiences of adult learners. Case study, role-play, and other interactive training exercises can be quite effective in drawing out the skills and experiences of consumer staff members.
- **Graduation ceremonies.** Hold a graduation ceremony after consumer staff members successfully complete their orientation and training processes. Such events formally recognize the achievement of these new consumer staff members, and thus enrich their experience. The ceremony can be as simple as distributing a certificate of completion or an actual event for the program staff.
- **Soliciting feedback.** When hiring youths, it might give new employees a boost if you encourage them to rewrite the program's employee handbook using the language of young people (that is, to make the handbook more "youth-friendly"). This exercise helps these new workers to internalize the expectations of the organization.

Advice from the Field: Use Training Opportunities to Assess Skills

Not quite sure about organizational fit for a new employee? Here are some ideas to consider:

Testing. Use paper-and-pencil testing to find out how much information new employees understand from the orientation process.

Training. Make the initial training program part of the final selection process. In one program, for example, four 3-hour training sessions are required of new "consumer consultants." Based on the results of the employment interview, the program invites consumers to attend these training sessions; being invited to attend does *not,* however, guarantee a job. By requiring final candidates to show up on time on four separate occasions for training, the employer gains insight into whether an individual can follow the program's routine. If there are any issues, they can be addressed early on through counseling or, if seen as beyond remedy, by withholding a formal offer.

Joint assessment. Use the initial training experience as an opportunity for both the candidate and program to assess if the two are a match!

Performance review. Schedule performance reviews 30 days after beginning employment for mutual feedback.

Action Step 5: Commit to Ongoing Professional Development

Consumer staff members benefit from ongoing, professional development opportunities. Monthly (and, in some cases, weekly) in-service training sessions, whether voluntary or mandatory, can address any and all topics previously outlined as well as:

- How to deal with difficult clients
- How to deal with difficult providers
- Handling difficult client/clinician interactions
- Anger management
- Handling constructive criticism
- Managing relationships with clients outside the treatment setting
- Role clarification (that is, "What hat am I wearing now, staff member or service consumer?")
- Updated information on HIV-related medical treatment
- Updated information in HIV-related psychosocial treatment and secondary prevention.

Whenever possible, in-service training sessions should include interactive exercises such as case studies or role-playing to allow for the practical application of new skills. Additional training for consumer staff members can occur off site at the local, regional, and national levels. Be sure to budget for staff members to take advantage of some excellent opportunities to promote professional development. Remember that attending out-of-town conferences may be challenging for consumer staff members because of childcare responsibilities.

Action Step 6: Think Creatively About Professional Development

Many programs are challenged in thinking about how to afford off-site training for staff members at a time of funding cutbacks. Some programs have found ways to support staff member participation in exciting training conferences and other educational opportunities. Options include:

- Taking advantage of all free local training opportunities, including training sponsored by pharmaceutical companies
- Helping consumer staff members prepare abstracts for presentation at training conferences
- Helping consumer staff members to locate and apply for scholarships to training conferences
- Finding out if regional (that is, citywide, statewide) consumer staff training is available in your jurisdiction

- Helping consumer staff members to locate and participate in extended training opportunities that can lead to certification in a particular area
- Offering tuition reimbursement or discounts on college courses (a common practice in university-affiliated Title IV programs)
- Offering flexible scheduling so that consumer staff members can take classes.

Finally, if consumer staff members grow beyond their roles and there are no opportunities for promotion within the program, program coordinators often will help prospective job seekers create or update their resumes.

Resources

The following organizations offer a variety of professional development opportunities:

AIDS Alliance Consumer Education Center

The AIDS Alliance Consumer Education Center encompasses a dynamic Consumer Leadership Corps, as well as an array of information and resources for youths, women, and care-giving men. The Consumer Leadership Corps is a group of consumer leaders that participates in an intense, exciting training program that teaches them how to train other consumers in their own neighborhoods and communities. Training corps members come from all over the country, and they are as diverse as the epidemic in terms of race, ethnicity, gender, sexual orientation, and geography. Because the training is so intensive, the program is limited to 40 entry slots each year. Additional information is available at:
www.aids-alliance.org/aids_alliance/consumer_education_center.html.

National Minority AIDS Council (NMAC)

NMAC is well known for its integral involvement with the U.S. Conference on AIDS, but it also plays host to other training opportunities for consumers, including the North American AIDS Treatment Forum (NATAF). The mission of NATAF is to train individuals who are interested in becoming treatment advocates and educators; increase the skills and knowledge of current advocates; and develop inclusive, national strategies to address issues of HIV/AIDS treatment.

For more information, contact:
Paul Woods (202-483-6622; pwoods@nmac.org).

National Association of People with AIDS (NAPWA)

NAPWA conducts a variety of training conferences, including an annual training conference for youths, which is held during Presidents' Day weekend.

Further information is available at:
www.napwa.org.

American Red Cross

Working in partnership with the Centers for Disease Control and Prevention, the American Red Cross sponsors a variety of HIV/AIDS educational programs, including:

- **New African American HIV Education and Prevention Instructor Course**, which addresses public health concerns for African American communities
- **New Hispanic HIV Education and Prevention Instructor Course**, which addresses public health concerns for Hispanic/Latino communities in the area of HIV prevention. It is designed by Hispanics for Hispanics.
- **Programs for Youth**, including "Act SMART," which helps young people make smart decisions and develop healthy behaviors to prevent HIV and AIDS and gain a sense of compassion for persons living with HIV or AIDS. The curriculum is divided into three units: for ages 6–9, 10–13, and 14–17.

Additional information is available at:
www.redcross.org/services/hss/hivaids.

Family Advocacy, Care, and Education Services (FACES)

Children's Hospital. FACES is the largest provider of HIV/AIDS social services for families in the greater New Orleans area. Their consumer staff orientation and training curriculum is recommended by a number of programs.

For more information, write to:
clientservices@facesonline.net or call 504-821-2084.

AIDS Education and Training Centers (AETC)/National Resource Center.

The AETC program comprises 11 regional centers (with more than 70 associated sites) that train health care professionals to treat persons with HIV/AIDS. AETC serves all 50 states, the District of Columbia, the Virgin Islands, Puerto Rico, and the six U.S. Pacific jurisdictions. The program goal is to increase the number of providers who are educated and motivated to counsel, diagnose, treat, and medically manage individuals with HIV infection and to help prevent high-risk behaviors that lead to HIV transmission.

More information is available at:
www.aidsetc.org.

The Parents' Place

The Parents' Place provides technical assistance to RWCA programs to address a wide range of consumer employment issues.

For further information, contact:
Josie Thomas at www.ppmd.org.

California Statewide Treatment Education Program (CSTEP)

CSTEP offers free, multi-tiered, high-impact training on the most current information about HIV and its treatment. This program is appropriate for HIV care and treatment providers including case managers, treatment advocates, peer advocates, outreach workers, health educators, mental health counselors, and substance abuse counselors. Training sessions are conducted in both English and Spanish throughout the state of California.

For more information, contact:
Claire Wingfield, CSTEP Program Supervisor (claire@apiwellness.org or 415-292-3420, extension 312).

Para consultas en español, por favor contacte con:
Manuel Sangüesa, CSTEP Program Coordinator (manuel@apiwellness.org or 415-292-3420, extensión 317).

Additional information is available at:
www.apiwellness.org/v20/research/cstep.html.

Massachusetts Department of Public Health (MA DPH)

MA DPH offers a variety of training opportunities, including a positive prevention training program. For further information, contact Jorge Sanchez, Director of Training, HIV/AIDS Bureau, MA DPH at jorge.sanchez@state.ma.us or 617-624-5327.

For more information about the
positive prevention training program, contact:
John Ruiz, Consumer Office, MA DPH at john.ruiz@state.ma.us or 617-624-5389.

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Tools for Success 6.1

Guide to Staff Orientation

This guide is meant to provide guidance to program managers to ensure new staff receive orientation to basic program and agency information, policies and procedures within a reasonable period of time after starting in the job. The table below outlines a schedule of topics and timelines. The person providing the orientation and the new staff person should date and sign off on each orientation topic as it is completed. When completed, this form should be placed in the staff's personnel file at the program, as documentation of orientation. A copy should also be given to the JRI Health office manager for the main personnel file.

Completed (date and sign)	Topics to Cover	Staff Responsible	Tools Utilized	How Soon
	Job responsibilities Their responsibilities and tasks Work hours Participating in supervision Participating in certain regular meetings	Supervisor	Review of job description Schedule to "shadow" staff doing similar job in program, to observe such activities as phone calls, interactions with and visit to other providers, home visits with clients, etc. Review and then discuss client files/other records relating to consumers served Program policies and procedures manual	Within first week
	Physical work space The alarm system Locking up the office Officer hours Location and use of office equipment Bathroom locations Use of thermostat Fire exits and extinguishers	Program staff doing similar job ("Work Buddy") Or Office Manager	Tour of space	Within first two days

Completed (date and sign)	Topics to Cover	Staff Responsible	Tools Utilized	How Soon
	Technical systems Phones Computer, including location logging onto network and email, using word processing, printing, saving files, organizing files Voice mail	Program Tech. Associate And/or “Work Buddy”	Provide copy of phone and voicemail manuals/instructions. Provide hands-on demonstration. Demonstrate how to log into and access network, email, and word processing; how to save files; how to print. Make recommendations to supervisor for computer training(s) as appropriate.	Phone/voicemail within first two days Computer (network, email, internet) within first week
	Most critical program policies and procedures Program-specific client appeal procedures How to report critical incidents (and definition) Safety-related behavioral guidelines for clients in the program space. Safety-related protocols related to assessing and addressing safety issues in office, during home visits, etc. Emergency procedures related to fires, etc.	Supervisor	Provide copies of selected JRI policies and procedures. Review and discuss.	Within first week
	Program fiscal information Funding sources Reporting requirements Data collection procedures	Supervisor	Provide copies of data collection forms, reporting forms, schedule of reporting	Within first two weeks
	Most critical Health Division policies and procedures Client grievance procedures Critical incidents (definition, reporting, protocols)	Supervisor	Provide copies of these specific policies and procedures. Review and discuss. Review Table of Contents of JRI Policy and Procedure Manual.	Within first week

Completed (date and sign)	Topics to Cover	Staff Responsible	Tools Utilized	How Soon
	Most critical personnel policies and procedures Confidentiality Sexual harassment policy Staff grievance procedures Time sheets Explanation of paid holidays Process for calling in sick Process for requesting time off Signing up for insurance and other benefits	Supervisor	Provide copy of JRI Personnel Policy Manual Review and discuss these specific sections and others as appropriate Schedule appointment with Administrative Assistant to sign up for benefits and to complete other hiring related paperwork.	Within first two days
	Other JRI Health programs Overview of other programs Internal referral process	Supervisor	Provide written information about each program as available (for example, brochure). Provide overview of each program: its purpose, target population, services, referral process, point person Schedule visit to each program Schedule meeting with supervisor’s supervisor	Within first two weeks.
	JRI (non-Health) programs Overview of non-Health programs Internal referral process	Supervisor	Provide JRI agency brochure which describe each program Provide overview of each program: its purpose, target population, services, referral process, point person	Within first two weeks

Tools for Success 6.2
Assessing Training Needs

Please tell us what training would enhance your existing skills.

Topic	Employee	Previous Training in this Area
Self Presentation		
Managing Personal Issues		
Computer Literacy		
Public Speaking		
Organizational Skills/Time Management		
Stress Management		
Reading and Writing Skills		
Leadership/Supervision Skills		
Other:		

Tools For Success 6.3
Special Topics Training Assessment

Employee name:____

Please tell us about your previous training experience and your current training needs!

Topic	Date of Last	Need Training
HIV, TB and Hepatitis C		
Progression and treatment		
Overview of the Ryan White CARE Act		
Case management issues		
Advocacy skills and self care		
Setting appropriate boundaries		
Coordinating peer advocacy and case management		
Client rights and responsibilities		
Client interviewing and documentation		
Ethics and professional conduct		
Consumer confidentiality		
Contract compliance		
HIPAA compliance		
HIV-related psychosocial issues		
Mental health, substance abuse, and crisis intervention		
Permanency planning and foster care/adoption		
Cultural diversity and sensitivity		
Special concerns of women living with HIV		
Local resources		
Accessing benefits		
HIV prevention education		
HIV research and clinical trials		
Adolescent development		

Outreach and case finding		
Personal safety		
Interviewing Skills		
Counseling Skills		
Support group facilitation		
Anti-retroviral therapy adherence		
Culturally competent care		
Alternative approaches to care		
How to read a TB test		
How to conduct a survey		
How to use research and evaluation data		

Other____

Other ____

Tools for Success 6.4
Peer Advocacy Program Overview

Purpose

Metrolina AIDS Project (MAP) is a community-based comprehensive AIDS service organization serving the Charlotte, North Carolina, region. MAP is committed to involving consumers in the planning, implementation and evaluation of all services. MAP believes that consumer involvement creates a more compassionate and responsive organization. The Peer Advocacy Program of MAP is designed to empower and train consumers to serve as peer advocates. The peer advocate position can either be a paid, part-time position or a volunteer position. Peer advocates can serve in a number of roles including: identifying other HIV positive individuals not in care, educating other consumers about services and research/clinical trial opportunities and serving as advocates and mentors for others living with HIV disease.

Program Description

The Peer Advocacy Program offers a number of consumers (6–8) an opportunity to receive training, mentoring, and placement as a part-time contract peer advocate or a volunteer peer advocate. Consumers complete an application for the program. A peer advocacy team (experienced consumers and staff) reviews the applications and then selects 6 to 8 consumers who commit to the program. These consumers are selected on diverse life experiences, leadership, and their willingness to be involved in programming and advocacy training.

The program provides a 16-week training curriculum. This training is conducted in two phases. Phase I consists of group trainings and individual meetings that focus on personal skills development that includes the following topics: empowerment, bonding, self-esteem, team building, trust, leadership, psychosocial issues of HIV, boundaries, and disclosure. This phase must be completed before going into Phase II. In Phase II the focus is on professional skills development that includes the following topics: review of the Ryan White CARE Act, the Ryan White funding and available services, education on HIV research and clinical trials, AIDS prevention education, HIV treatment education including adherence issues, how to conduct outreach and case finding, how to participate and/or facilitate a meeting, mentoring and coaching, and an overview of available resources/services for people living with HIV.

Upon completion of the 16-week training, the participants will have a graduation ceremony and be recognized by the agency and the community as trained peer advocates who will be given opportunities to represent the HIV positive community and serve as mentors and advocates for other people living with HIV. Peer advocates are provided ongoing training opportunities, monthly meetings for support, and guidance and one-on-one supervision.

Goals

1. To engage more consumers in the planning, implementing and evaluation of services for MAP.
2. To provide support, education and training to consumers such that more consumers can assume active roles on planning bodies and become empowered to better advocate for themselves and other people living with HIV.
3. To encourage consumers to advocate for other consumers in accessing care and services in the community.
4. To create a more empowered HIV population that is knowledgeable about treatment, research and personal decision-making in their own health care and the health care of others living with HIV.

Objectives

1. To empower consumers on their own abilities to serve others in accessing HIV care and services.
2. To increase the self-esteem and support systems of all participants in the program.
3. To teach consumers about the Ryan White CARE Act and all the services provided through the Act.
4. To educate participants on HIV research and clinical trials.
5. To educate participants on HIV treatment and adherence.
6. To educate participants on HIV prevention for positives.
7. To teach participants how to do outreach and case finding.
8. To educate participants on available resources and services in the community.
9. To identify ways of getting involved in the community as a peer advocate.

Consumer Involvement Opportunities

- Paid staff position
- Serve as board member for MAP
- Serve as part-time paid peer advocate/mentor
- Serve as volunteer paid advocate/mentor
- Serve as a member of the community advisory board (program planning, advising and evaluation)
- Serve on other boards in the community (consortium, regional planning council, other organizations)
- Serve as a general volunteer for the agency (public speaking, office work, fundraising, child care, etc.)

This model was created by MAP in 1999 but was recently modified to include the personal skills development as well as training modules included in the Core Leadership Training Program by the AIDS Alliance for Children, Youth and Families of Washington, DC. The program is managed by Faye Marshall, Caring for Families, Title IV.

Selection Criteria for Consumer Advocacy Training Program

- Participants must be diagnosed with HIV/AIDS.
- Participants must be actively involved and participating in programming.
- Participants must be willing to and comfortable with self-disclosure.
- Participants should have demonstrated leadership capabilities exhibiting a desire to grow both personally and professionally.
- Participant must be willing to actively participate in planning bodies.
- Participant must demonstrate the ability to gain skills necessary to serve in the role of a Peer Advocate.
- Participants with prior substance abuse history must have 6 months of time free from substance use and be actively involved in the recovery process.
- Participants must be willing and able to commit to completing all the required training sessions and other related activities associated with the Consumer Advocacy Training Program.

Consumer Involvement Policy

MAP is committed to the involvement of consumers in the planning, implementing, and evaluation of services. MAP believes the essential roles of consumers create a more compassionate and responsive organization. The agency encourages and supports consumers and staff, volunteers (including board members) and as peer advocates. MAP is committed to maintaining consumer representation on staff, board, and volunteer positions within the agency.

MAP defines a consumer as any employee, client or volunteer who is HIV positive (infected) or has HIV in their household (affected). This would include partners, foster parents, adoptive parents, and other caregivers.

All HIV infected/affected staff members are treated equally and fairly as any other staff member. All staff members are governed by the personnel policies of the organization. All staff members have job descriptions, appropriate supervision, and rates of pay comparable to others doing similar work in the agency. Staff members who are consumers are able to access services at MAP if the individual meets the criteria for the service. Typically services would be provided from a staff member not working in the same program to avoid conflicts of interest and any dual relationships of staff and client. This is provided under the direction of their supervisor and id managed on a case-by-case basis. Consumers as staff members are provided a mentor, if the staff person requests this additional supervision. Consumers are protected by confidentiality agreements either as staff, volunteers or clients. Disclosure of HIV status is the responsibility of the HIV individual and not other staff members or volunteers.

MAP has a commitment to maintain staff and board members that reflect the populations affected and infected by this disease. The agency maintains this representation based on race, ethnicity, sex, and sexual orientation as reflective of the HIV community.

Activities that consumers are involved in include: program planning, decision-making on programs, implementation of programming, evaluation of programs, peer outreach, case finding, peer mentoring, prevention education, public speaking, training, conducting surveys, data collection, and participation on boards and committees in the community (community advisory board, consortium board and committees, regional planning council, state advisory boards and other community committees).

Consumer Advocate Training Orientation

Why do I want to become an advocate?

A. Leave your cares at the door exercise (5 minutes)
B. Introductions (10 minutes)
    i. Introduction of consumer advocate staff
    ii. Introduction of consumer advocate training
    iii. Introduction of participants
C. Get to know each other icebreaker (10 minutes)
D. Establishing ground rules (15 minutes)
    i. Encourage participants to set up ground rules at the beginning of the training program. The ground rules will be written on a poster and hung in the training room. This will serve as a reminder to training participants of what is appropriate to do and say. It helps people to feel more comfortable if they know what to expect from the training.
    ii. Discuss the rules until all participants agree on the choices for rules.
    iii. Ensure that the rules/expectations to be considered include:
        1. Confidentiality
        2. Respecting each others' opinions and ideas
        3. Respecting each others' sexual habits
        4. Commitment to the training
        5. Being on time

        6. Participating in the training
        7. Completing homework
        8. Being non-judgmental

    E. Share a quote (5 minutes)
    F. Review by member of training staff goals and objectives of consumer advocate training (15 minutes)

Goals

1. To engage more consumers in the planning, implementing and evaluation of services for MAP.
2. To provide support, education and training to consumers such that more consumers can assume active roles on planning bodies and become empowered to better advocate for themselves and other people living with HIV.
3. To encourage consumers to advocate for other consumers in accessing care and services in the community.
4. To create a more empowered HIV population that is knowledgeable about treatment, research and personal decision-making in their own health care and the health care of others living with HIV.

Objectives

1. To empower consumers on their own abilities to serve others in accessing HIV care and services.
2. To increase the self-esteem and support systems of all participants in the program.
3. To teach consumers about the Ryan White CARE Act and all the services provided through the act.
4. To educate participants on HIV research and clinical trials.
5. To educate participants on HIV treatment and adherence.
6. To educate participants on HIV prevention for positives.
7. To teach participants how to do outreach and case finding.
8. To educate participants on available resources and services in the community.
9. To identify ways of getting involved in the community as a peer advocate.

Break (10 minutes)

G. Discussion Activity/Brainstorming – Why I want to be a consumer advocate (20 minutes)
    - I want to contribute something to the community
    - Desire to understand the HIV Disease
    - Ability to accept HIV+ without stigma
    - Ability to navigate the medical and service delivery system
    - Empowered to participate in trainings to become self-sufficient
    - Bonding with other consumer advocate leaders
    - Spiritual bonding with higher power
    - I want to develop my leadership skills
    - I want to become a public speaker about HIV/AIDS
    - I want to be productive and stay actively involved
    - I want to provide support for newly diagnosed persons
    - Personal desire to work closely with persons living with HIV/AIDS

H. Role Play (20 minutes)

Consumer advocates pair off and one takes the role of a newly diagnosed HIV+ person and the other is a trained consumer advocate. The newly diagnosed HIV+ person is dealing with depression and a lack of information about HIV. He/she does not know how to get a doctor or how he/she will pay for medications. The consumer advocate offers support and hope for the newly diagnosed person. The consumer advocate gives assurances that he/she will direct the newly diagnosed person to the service organizations that can get him/her the help they need. After 10 minutes the individuals switch roles. At the end of the role play session, each participant discusses his/her feeling while they were either the newly diagnosed HIV+ person or the consumer advocate.

I. Written Evaluation (5 minutes)

J. Closing Exercise (5 minutes)