United States National Institute of Mental Health
(HIV Prevention Trials Network 043)

STAFF TRAINING MANUAL:
Community Mobilization
NIMH Project Accept

Staff Training Manual: Community Mobilization

April 25, 2005

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Introduction

A. Purpose of this Manual
The purpose of this manual is to guide the training of Project Accept staff members to implement the community mobilization component of the intervention. Community mobilization staff members who will be trained using this manual are: 1) the community mobilization coordinators and 2) the community outreach workers.

The community mobilization coordinators will be trained on how to implement the community mobilization component of the intervention at a “training of trainers” workshop in Chiang Mai, Thailand May 19-23, 2005. Subsequently, those coordinators will return to their sites and train their site staff to implement the community mobilization plan. This manual is meant to serve BOTH purposes, first, it will be used to train the coordinators and then coordinators will use it to train their site staff.

As a multi-site study it is vitally important that all sites implement community mobilization activities that conform to common standards and procedures. It is therefore essential to train staff according to a commonly agreed upon training plan. We do recognize, however, that the social context in each site is unique and may require adaptations to the community mobilization strategy set out in the SOP and in this training manual. In those cases, adaptations are welcome; however, they should be submitted to the intervention committee prior to being implemented.

B. How this Manual Is Organized
This manual will be used to train staff in how to implement the community mobilization strategy as it is laid out in the community mobilization standard operating procedures (SOP) manual. The structure of the training manual follows the structure of the SOP closely and the two manuals should be used together during the training. This training manual is divided into 15 training sessions structured in a format that indicates each session’s objectives, the reference to the SOP, how much time will be needed, what equipment will be needed, the informational content, and instruction for the facilitator in how to deliver the session. Additional notes, forms, and other documentation for training participants are included in the appendices.

The entire content of the 4-day CBOV training curriculum is also provided as an appendix to this manual. We recommend that community mobilization coordinators provide community outreach workers with extended practice in facilitating the entirety of the CBOV training curriculum before implementing it with CBOVs.

Additions, amendments, and suggestions for improvement to this manual are welcomed. Please send them to Katherine Fritz (kfritz@telkomsa.net), Precious Modiba (modibap@hivsa.com), and Agnes Fiamma (afiamma@telkomsa.net)

Acknowledgements: The UCSF intervention core would like to thank Precious Modiba, Ann Beckemeyer, and Agnes Fiamma for their assistance in creating this manual. Material for some of the CBOV training sessions was adapted from intervention materials developed by the Zimbabwean staff of the study “A randomized trial of HIV prevention in Harare beerhalls” and we thank them for their assistance as well.
Training Day 1

Session 1: Introduction to the Training

Overview:
This session will introduce and orient the participants to the structure and content of the 5-day staff training and allow participants and the trainer to share ideas about their expectations of what the training will and should achieve.

Time:
30 to 45 minutes

Objectives:
By the end of the session, participants will be able to:
1. Identify the objectives of the training
2. Describe the overall organization of the training
3. Identify the areas that will be covered during the training

Materials:
- Powerpoint projector OR overhead projector and transparencies
- Flip chart and board
- Markers

Delivery:
1. Introductions
   The trainer(s) will welcome the group and facilitate introductions. The trainer can use an icebreaker of her or his choice at the beginning of this session to help relax people and get them talking to one another.

2. Overview of the Training
   The trainer will provide an overview of how the training will be organized (the trainer can use powerpoint, an overhead, or flip chart for this presentation). The following issues should be addressed:
   1. Logistics, including: hours, break times, meal times, and arrangement of the facility
   2. A description of the training materials that will be used (this manual, the SOP, and the CBOV training manual)
   3. A description of the scope of the training and its purpose (see below)

Purpose of the training:
- To prepare community mobilization staff members to implement the community mobilization standard operating procedures
- To create a forum for staff to contribute to the further refinement and development of the community mobilization strategies to be used at their site.

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1 For the ToT in Chiang Mai, Thailand, Day 1-5 correspond to 19-23 May, 2005
Scope of the training:
- The role of community mobilization in Project Accept
- The community mobilization process and phases
- Understanding the theory behind community mobilization in Project Accept (Diffusion of Innovation theory, otherwise known as DOI)
- Staff responsibilities
- Understanding what Project Accept’s innovation is and communicating it effectively
- Recruiting, training, motivating, and providing support to CBOVs
- Content of the CBOV training curriculum
- Techniques and methods for facilitating learning among adults (in preparation for training CBOVs)
- Opportunity to practice facilitation skills by leading CBOV training sessions and receiving feedback from the group

Note to the trainer: It will be important to emphasize that this training is not simply about instructing the staff in how to implement the CM strategy. We also encourage them to contribute to the further development and refinement of the CM strategy at their site through the forum of the training. We realize that the CM component of the intervention is a very dynamic one and needs to be very responsive to on-the-ground realities as they take shape over the course of the intervention at the various sites. Therefore, this training must always be very dynamic and interactive. It is also important to emphasize that some of the CM materials, such as scripts for recruiting CBOVs and the development of intervention promotional materials will be a process that begins during this training and continues after the training is complete. In this training we will suggest processes for the development of these materials but will not pre-determine their content as we think that should be developed locally by the staff and the CBOVs.

3. Participants’ Expectations
In this part of the session, the trainer will ask the participants to list several expectations they would like to see the training fulfill. The trainer should list these on a flip chart and then discuss how each one is likely to be fulfilled or not (and the reason why not). The list of expectations should be kept in the room until the end of the training. They should be re-visited at the end of the training to ensure that expectations have been met and if not it should be clear why. This part of the session is very useful for clarifying the scope of the training and alerting the trainer to what areas the participants may be anxious about.
Session 2: What is Community Mobilization?

Overview:
As a start to the training, it will be useful to explore the most basic question: what do we mean by the term community mobilization? This session will encourage participants to explore this concept in general and with reference to the goals of Project Accept. This session will provoke discussion about what we hope to achieve through the community mobilization component of Project Accept.

SOP Reference:
Section II.A

Time:
2 hours

Objectives:
By the end of the session participants should be able to:
1. Describe the three most important elements of any community mobilization effort.
2. Describe how community mobilization will contribute to the achievement of the overall aims of the Project Accept research study.
3. Describe the difference between community mobilization and community preparedness/involvement in Project Accept.

Materials:
- Flip charts and markers
- Projector or paper copies of slides

Delivery:

1. Brainstorm: what does community mobilization mean?
The trainer should first engage the group in an exercise to clarify what community mobilization means. The trainer asks the participants to think about community mobilization efforts they may have heard about, known about, been involved with, or observed. Ask them to answer the following questions:

- What was the purpose of the community mobilization effort?
- What techniques/methods were used?
- From your vantage point, was the effort successful? If so, why. If not, why not?
- What lessons would you want to take from that effort?

Following this discussion, the trainer asks the group to come up with 3 (and only 3) most important elements of successful community mobilization.

Note to the trainer: (see CM SOP Section II.A)
To mobilize a community around any issue or problem, such as the HIV epidemic, is to raise the community’s consciousness about that issue through education, support the community to
think about how the issue affects them, and to nurture the will and commitment of community members develop constructive responses.

2. **What does community mobilization mean with respect to Project Accept?**

What are we mobilizing communities to do in Project Accept? The trainer asks the group to reflect on the following questions:

1. What are the aims of the Project Accept intervention?
2. How does the community mobilization component of the intervention contribute to the achievement of those aims?

The trainer should facilitate a discussion that draws attention to the importance of community mobilization in achieving Project Accept’s aims and objectives, specifically around stigma reduction, adoption of VCT, PTSS and reduction of risk behaviors.

*Note to the trainer:* (see CM SOP Section II.A)

The Community Mobilization activities for Project Accept aim to 1) create awareness about and an open dialogue around HIV/AIDS in communities, 2) enhance the communities’ understanding of, participation in, and enthusiasm for VCT and PTSS, 3) to foster understanding and acceptance of HIV positive members of the community (stigma reduction), 4) to promote HIV risk reduction among all community members, and 5) to ensure that steps 1-4 continually reinforce one another.

3. **Community Mobilization vs. Community Preparedness/Involvement**

This is often an area of confusion for staff and needs to be clarified at the outset. The trainer should briefly describe the distinction between community preparedness and mobilization. For example, community preparedness and involvement includes identifying and informing political and traditional community leaders about the study. This happens in all study communities. Community mobilization is different because it is a component of the intervention and involves engaging a broader spectrum of opinion leaders and community members to become social change agents within their communities to help deliver the intervention. Any confusion about this distinction should be cleared up at this time.

*Note to the trainer:* (see CM SOP Section II.A)

Community preparedness/involvement describes the process through which researchers gain entry into study communities, identify community stakeholders, establish rapport with stakeholders and community members, educate community members about the aims and procedures of the study, negotiate “buy-in” among community members, prepare community members to participate as partners in the research activities, and work to maintain that involvement in the research process over the entire course of the study. Community preparedness/involvement activities continue throughout the study period in both intervention and comparison communities and revolve around the work of the Community Working Groups, which have the responsibility of representing community members’ interests and ensuring that the research study as a whole serves community interests. In addition, as new social networks become involved in Project Accept over the study period, community preparedness activities will be undertaken with them. Therefore, it is difficult to state that community preparedness ends at an exact point at which community mobilization begins. Rather, we should view community preparedness as an ongoing process within both control and intervention.
communities. Community mobilization, however, is a component of the intervention that occurs only after randomization of communities and only within those communities randomized to receive the intervention. The Community Mobilization activities are aimed specifically to create awareness about and an open dialogue around HIV/AIDS in communities, enhance the communities’ understanding of, participation in, and enthusiasm for VCT, to foster understanding and acceptance of HIV positive members of the community (stigma reduction), and to promote knowledge and practice of HIV risk reduction among all community members.
Session 3: Diffusion of Innovation Theory

Overview:
All of Project Accept community mobilization strategies are based in Diffusion of Innovation Theory (DOI). Before we discuss the specifics of the Project Accept CM strategy, we must come to terms with the principles of DOI. In this session, we will provide an overview of Diffusion of Innovation Theory and prompt participants to begin thinking about how it applies to Project Accept goals.

SOP Reference:
Section III and IV

Time:
2 hours

Objectives:
By the end of the session participants should be able to:
1. Describe the basic principles of Diffusion of Innovation (DOI) Theory
2. Identify several ways in which DOI is an appropriate theory on which to base Project Accept CM strategies.

Materials:
☐ Flip charts and markers
☐ Projector or paper copies of slides

Delivery:

1. What is an Innovation?
Refer participants to Section IV of the Community Mobilization SOP, which outlines what an innovation is and what qualities contribute to an innovation’s adoption by a group of people or a community. All participants should be relatively familiar with these concepts. The trainer can ask someone in the group to summarize the following.

- What are the attributes of an innovation that affect the ease with which it will be adopted?
- What are the stages people go through in deciding whether to adopt an innovation?

Remind participants about the inherent difficulty people have in adopting an innovation that may have no obvious tangible benefits, or that provides a delayed benefit (such as losing weight today in order to avoid a heart attack in 20 years).

Using figure 5.1 from the Community Mobilization SOP, ask participants to give examples of innovations that have diffused in their own communities and how they have come to be adopted, maintained or abandoned. Examples of this could be family planning practices, smoking, substance use/abuse, and healthy/unhealthy dietary changes. Ask participants to think about what innovations have been adopted and what has contributed to them becoming self-sustaining.
2. How do Innovations Diffuse?
Referring again to Section IV of the Community Mobilization SOP, the trainer leads the group in a discussion of the process through which innovations diffuse in a community. This discussion should revolve around the role of the change agent in adopting the innovation him or herself and then modeling that behavior to members of their social network and talking about its benefits. The group should review the 5 factors that affect the success of change agents:

- Change Agent Effort
- Orientation toward the client
- Empathy
- Homophily
- Credibility

Using the example from Diffusion of Innovation about Norplant, ask participants to analyze and discuss how the change agents failed according to the 5 factors above. This is an interesting case study because although the innovation was widely adopted, the quality of the process was very seriously compromised. The trainer should be sure to bring up the topic of quantity vs. quality.

3. DOI Theory as applied to Project Accept Community Mobilization
Divide the group into two. The trainer asks one group to consider the question:

- What is/are the Project Accept innovation(s) and what are the factors that will determine the ease with which it will be adopted?

The trainer asks the second group to consider the question:

- How will the Project Accept innovation(s) diffuse in the study communities? What factors will determine the success of the diffusion process?

Give the groups about 15 to 20 minutes to discuss and then bring them together to present their thoughts. The trainer should carefully document the ideas that emerge and seek to clarify any areas of confusion regarding how DOI theory relates to the Project Accept innovation(s).
Session 4: The Role of “Change Agents” in Project Accept

Overview:
The work of “change agents” is at the heart of the community mobilization activities for Project Accept. The innovation will only spread through the work of these visionary people who believe in the benefits of the innovation and want to see their communities transformed by it. In this session, we will explore what change agents are, the reasons they are important to the diffusion of the innovation, and the personal characteristics that help change agents to be effective. We will also apply the change agent principles to Project Accept and explore who our project’s change agents are and what characteristics they need to have.

SOP Reference:
Sections III.D.2 and III.D.3

Time:
1.5 hours

Objectives:
By the end of the session participants should be able to:
1. Define the term “change agent”
2. Identify the main reasons why change agents are important to the diffusion of an innovation
3. Identify the characteristics of effective change agents
4. Identify who change agents are within Project Accept
5. Identify the characteristics we expect Project Accept change agents to have

Materials:
- Powerpoint projector and laptop OR overhead projects and transparencies.
- Flip chart paper, board, and markers

Delivery:

1. What are change agents?
The trainer should ask the participants to think about an innovation they have adopted within their lifetime. Give the participants some time to think about this and decide on an example. The trainer should go around the room and ask a few people what that innovation was. If participants are having a hard time thinking of innovations, the trainer should have an example of their own in mind to provide. Then the trainer asks the participants to think about who may have influenced them to adopt that innovation (it may have been just one person or it may have been a group of people) but the participants should think back to the time they really got serious about adopting the innovation and who was involved in their decision. The trainer should ask the participants to share their examples and the trainer should share her or his own. The trainer should now ask the participants to brainstorm the following two questions:

- How did those people influence you? (this can be overt or subtle)
- Why do you think their influence worked?
What personal characteristics did those people have that made them effective in influencing you?

*Note to the trainer:* The brainstorm should elicit a discussion of the various ways in which we are all influenced to take risks on trying something new. This influence often comes most powerfully from people we know and trust AND from people who themselves have tried the innovation and have benefited from it. These people are “change agents.” One other interesting thing to note is that change agents don’t always have to know they are change agents in order to be effective. But they do have to believe in the innovation.

**2. Presentation on Change Agents from DOI Theory**
The trainer gives a presentation on change agents from DOI theory. In giving this presentation, the trainer should refer back as much as possible to some of the issues that were brought out by the group in the previous brainstorm session in order to relate their own ideas with DOI theory.

*Note to the trainer:* This presentation is drawn from Section III.D.2 and III.D.3 of the CM SOP. Please review those sections of the manual in preparation for this presentation.

**3. Change Agents within Project Accept**
The trainer asks the group to apply all the principles they have been discussing about change agents in DOI theory to the task of identifying who Project Accept change agents will be and what qualities they need to have in order to be effective. It should be easy for the group to see that Project Accept has two types of change agents: CBOVs and outreach staff. The group then needs to brainstorm what are the important characteristics each group needs to embody.
Session 5: Staff and CBOV Roles and Responsibilities

Overview:
This session is a natural extension of the previous session on Change Agents. It is very important for staff to clearly understand their own roles and responsibilities as well as those of the CBOVs, with whom they will work closely. In this session, we will clarify those roles and responsibilities and see how they relate to the overall goals of the CM strategy.

SOP Reference:
Section V

Time:
1 hour

Objectives:
By the end of this session, participants will be able to:
1. Describe their own roles and responsibilities as staff members
2. Describe the roles and responsibilities of CBOVs
3. Describe the working relationship between staff and CBOVs

Materials:
- Flip chart and board
- Markers

Delivery:
1. Staff Roles and Responsibilities
The trainer should first review what is in Section V of the SOP manual, as a reference point to the role staff members will play in the CM strategy. These include:

The Community Mobilization Coordinator is responsible for overseeing all aspects of the community mobilization work at the site. The coordinator supervises the outreach workers and assists them as needed in the field to accomplish their duties. The Coordinator reports to the Project Director. Specific responsibilities include:

1. Develop and implement a community mobilization workplan for the site, including objectives, strategies (see no. 3 below), activities, staff and volunteer responsibilities, and timeline
2. Maintain relationships with community leaders to keep them apprised of the project, including religious, government, traditional, and opinion leaders
3. Adapt the generic community mobilization strategies to the site; these adaptations will include developing specific strategies for identifying social networks and strategies for penetrating them
4. Facilitate a process to utilize the guidelines on promotional materials development and gather input from CWGs, Outreach Workers, and CBOVs to create promotional materials appropriate for the community
5. Train, orient, and coordinate the work of, supervise, and appraise the performance of outreach workers.
6. Review and approve the CBOV candidates put forth by outreach workers.

The Outreach Workers are responsible for carrying out the community mobilization strategy on the ground and hand-in-hand with CBOVs. This includes recruiting, training, supervising, and monitoring the Community-based Outreach Volunteers. The Outreach Workers report to the Community Mobilization Coordinator.

1. Assist coordinator in designing and implementing site-specific community mobilization strategies
2. Work with coordinator and CBOVs to design promotional and educational materials for use around the caravan/mobile testing site and for use by CBOVs as they penetrate social networks
3. Assist the coordinator in identifying social networks and strategies for penetrating them, identifying and engaging opinion leaders, and maintaining relationships with community leaders
4. Educate community members around the caravan/mobile testing site about HIV/AIDS and Project Accept
5. Identify CBOV candidates
6. Organize and conduct trainings and orientations for CBOVs
7. Conduct strategic planning with CBOVs to come up with a realistic workplan and goals.
8. Supervise and appraise the performance of CBOVs, using QC tools such as CBOVs' logs and diaries

After reviewing these roles and responsibilities, the trainer should ask participants to add other roles and responsibilities they feel they should play or have. Each suggestion should be discussed by the group to decide if it is an appropriate addition that should be adopted. Participants may have many diverse ideas about what role they think they should play. The trainer should make sure that any additions to the list above are in keeping with the goals of the CM strategy. Keep a list of all the roles and responsibilities the group comes up with.

2. CBOV Roles and Responsibilities
The trainer should open a discussion around the roles and responsibilities of the CBOVs based on the ideas set out in the SOP. These are:

The CBOVs are volunteers. They are responsible for diffusing the innovation throughout their social networks and will require a high degree of specialized training to do so. They will be supported in their efforts by the Outreach Workers.

1. Develop strategies for and implement the site's community mobilization strategy. Note that CBOVs will penetrate social networks in community venues (schools, churches, community meeting places, households/"door-to-door") and will not work/be situated around the caravan/mobile site
2. Steer and engage in both formal and informal discussions about HIV/AIDS and promote active participation of community members to embrace the concept of VCT at all community levels
3. Distribute educational materials on HIV/AIDS
4. Respond to questions and engage in discussions about HIV/AIDS
5. Liaise with peer groups and social clubs
6. Utilize QC tools such as logs and diaries to document their activities

The trainer should facilitate a discussion among the participants about other roles and responsibilities they feel the CBOVs are likely to play. The group should discuss if these ideas should be added to the list above. The trainer should be careful to ensure that all additions are in keeping with the overall CM strategy. Keep a list of all the roles and responsibilities the group comes up with.

3. How will Staff and CBOVs relate to each other?
This is a very important topic that deserves some exploration with the participants. It is not a topic that is addressed directly in the SOP but the trainer should ask participants to share their views of how they see this relationship being structured. In general, the model we would like to suggest that sites follow is one in which the CBOVs and staff feel themselves to be partners in the CM effort as opposed to a model in which the CBOVs are seen as “assistants” or lower-level “employees” of the outreach staff. In the end, as members of the social networks through which the innovation will need to diffuse, it is the CBOVs themselves who will be key to the successful diffusion of the innovation. In order to ensure that this diffusion happens effectively, a major staff role will be to prepare, support, and motivate CBOVs to do that work. Staff will, of course, also engage in community mobilization activities themselves along with CBOVs.

4. Conclude
As this training progresses, new ideas may come up about the roles and responsibilities of the staff and CBOVs. It will be helpful to keep the results of this session’s discussions at hand so that the plans can be adjusted. It may also be helpful to review this session on the last day of the training just to make sure all the ideas have been captured and participants have a clear understanding and agreement about staff and CBOV roles.
Training Day 2

Session 6: Recruitment of CBOVs

Overview:
Recruiting CBOVs will be one of the most challenging and important activities we undertake as part of the community mobilization plan. In order to ensure that the diffusion of the innovation takes place with enough efficiency that we are able to meet our overall study goals, the group of CBOVs has to be carefully chosen. In the previous session, we identified the key characteristics we want CBOVs to have. In this session, we will discuss how we identify those types of people and recruit them to be part of the CBOV group.

SOP Reference:
Sections VI.A-D

Time:
2 hours

Objectives:
By the end of the session, participants will be able to:
1. Identify the 4 stages of the CBOV identification and recruitment process
2. Describe the specific methods they will use in each stage
3. Describe how they will document the identification and recruitment process

Materials:
- Flip chart and board
- Markers
- Sample Forms for Documenting the Recruitment Process (see QC CM Social Network and Opinion Form v1.1)

Delivery:
1. Steps to Identifying and Recruiting CBOVs
The trainer presents an overview of the 4 stages of the recruitment process (trainer: refer to SOP Sections VI.A-D). During the presentation, the trainer should stop after presenting each stage of the recruitment process and have the group complete the exercises below. These are:

A. Step One: Identify social networks in the study community
The group should brainstorm the various social networks in their communities that they can already see will be important to penetrate in order for the diffusion of innovation to occur. Ask the staff to present some examples of social networks they think will be important and why they think so. Ask them to characterize these example social networks according to the following factors:

- Who are the typical members of this network?
- What common social characteristics do the members share?
What common interests seem to bind this network?
What are the values and norms of this network?
Through what channels and how frequently do members of this network communicate?
Does the network seem to have formal or informal leaders?
What roles do the leaders play?
How much influence do the leaders have?
Can we identify opinion leaders with this network?
How innovative or conservative does this network seem?

B. Step Two: Identify opinion leaders from each social network
The group should think about opinion leaders they may already know from their community preparedness work. Discuss the following:

- How do they know she or he is an opinion leader?
- What qualities does she or he have that make them an opinion leader?
- What evidence should we examine to confirm this person is an opinion leader?

C. Step Three: Mobilize opinion leaders to become early adopters
Ask the group to think about what messages we could give to opinion leaders to entice them to use the study’s mobile VCT service. Participants should develop a short script and role-play the situation a few times to explore what approaches might work.

D. Step Four: Inviting People to Become CBOVs
Assume from the previous role-plays that your candidate CBOVs did indeed decide to use the mobile VCT service. Now do another role-play in which you explain to him or her what it means to be a CBOV and invite them to join.

Note to the trainer: The process of developing scripts will take more time than is available in this session. Further sessions should be conducted with staff in which there is more time to develop and practice the recruitment process and develop scripts.

2. Documenting the Process
The trainer will introduce the forms we would like the staff to use to document the process of identifying and recruiting CBOVs. These forms will serve the purpose of helping the staff both to organize the process of recruitment and track how it was done.
Session 7: Overview of CBOV Training

Overview:
CBOVs will participate in a 4-day training that prepares them for the work ahead. Community Outreach Workers and the CM Coordinator will be responsible for facilitating these trainings. Therefore, it is important for staff to have a thorough understanding of the objectives, content, and methods of the CBOV training. In this session we will introduce the staff to the content of that training curriculum.

SOP Reference:
Section VI.D

Time:
1 hour

Objectives:
By the end of this session, the participants will be able to:
1. Identify the objectives of the CBOV training
2. Explain how the training is organized and its main themes

Materials:
☐ CBOV training curriculum

Delivery:

1. Objectives of the CBOV Training
The trainer should present an overview of the objectives of the CBOV training. These are:

- To orient volunteers to their role as a CBOV
- To impart to CBOVs the necessary skills they will need to promote the innovation to members of their social networks.
- To impart to CBOVs the necessary information they will need to promote the innovation to members of their social networks (HIV basics, HIV prevention, and the role of VCT and PTSS in reducing the spread of HIV in our communities).

2. Content of the CBOV training
The trainer and participants will examine together the contents of the CBOV training curriculum and discuss how each training session relates to the overall objectives of the training and the role the CBOVs will play in the CM strategy. Participants should be encouraged to ask questions and make suggestions for ways to further refine the content of this curriculum at their sites. The curriculum is a core set of sessions that participants are encouraged to refine and embellish as appropriate for their site.

3. Participants choose sessions to practice
Each participant should choose one or two CBOV training sessions to prepare for the next day’s practicals where participants will facilitate sessions for the group and receive feedback.
Session 8: Principles of Adult Learning and Facilitation Techniques

Overview:
As adult learners, CBOVs will require a certain type of learning environment and approach. It will be important for our staff to understand the basic principles of adult learning as well as group facilitation techniques. In this session, we will examine both areas. At the end of this session, participants will also have time to prepare themselves for the practicals tomorrow, when they will facilitate a CBOV training session and apply the principles of adult learning and facilitation techniques.

Time:
4 hours

Objectives:
By the end of this session, participants will be able to:
1. Identify the unique needs of adult learners
2. Name several methods and approaches trainers can use to make the learning environment conducive to adults
3. Describe methods for facilitating learning among adults
4. Describe the basic principles of good group facilitation and how to handle difficult situations

Materials:
- Power point presentation (optional)
- Flip chart, paper, markers
- Appendices 2 and 3

Delivery:
1. A Brief Guide to Adult Learning
The trainer should introduce the principles described in Appendix 1. The trainer can put together a powerpoint presentation based on the information in Appendix 1. Following the presentation, the trainer should ask the participants to share experiences they have with adult learners and provide any insights they can on techniques that are useful.

2. A Brief Guide to Facilitation Techniques
The trainer should introduce the principles described in Appendix 2. The trainer can put together a powerpoint presentation based on the information in Appendix 2. Following the presentation, the trainer should ask the participants to share experiences they have in facilitating groups and provide any insights they can on techniques that are useful.

3. Preparation for Practicals tomorrow
The trainer should now give the participants time to review the CBOV training session(s) they chose to practice facilitate tomorrow and to prepare. In preparing, the participants should reflect on how they can use the principles of adult learning and good facilitation techniques to
make their session a success. The trainer should circulate among the participants providing clarification and assistance in making the preparations.
Training Day 3

Session 9: Facilitating CBOV training sessions (practicals)

Overview:
Facilitating the CBOV training successfully will take much practice. This all-day session will allow the participants to begin practicing facilitating CBOV training sessions and receive feedback on their performance. It should be noted that practice sessions such as these should continue with staff until the CM Coordinator is satisfied that staff is prepared to commence the training of CBOVs.

Time:
6 to 8 hours

Objectives:
By the end of this session, participants will be able to:
1. Successfully facilitate at least one CBOV training session
2. Provide constructive feedback to their colleagues on facilitation techniques and suggest areas for improvement
3. Understand her/his own areas of strength and weakness in group facilitation and training

Materials:
- CBOV training manual
- All materials required for facilitating respective sessions
- Flip chart, paper, and markers
- Video camera and television (optional)

Delivery:

1. Introduction
The trainer should introduce the objectives of the session and present a schedule of what sessions will be demonstrated today, by whom, at the time schedule that needs to be adhered to in order to finish by the end of the day. Each session needs to be followed by 20-30 minutes of time that will be used to give feedback to the presenter on her/his technique as well as to provide feedback on the content of the session.

2. Guide to providing feedback
After each participant takes her/his turn facilitating a CBOV training session, there will be time for feedback. The trainer will provide guidelines on giving constructive feedback. Constructive feedback should answer the following questions:

- What did the presenter do well?
- What techniques did the presenter use that you appreciated?
- What did you learn from watching that will help you improve your own technique?

What areas did you think needed improvement?
- How would you suggest the presenter make those improvements?
What basic principles of facilitation techniques and adult learning (that we discussed yesterday) were exemplified in this session?

Could the presenter have followed the principles better? If so, how?

Was the content of the session appropriate to its objectives?

How could the content or flow of the session be improved?

3. Presentation of Sessions
The participants will spend the remainder of today presenting the session(s) they have prepared and receiving feedback. The trainer will carefully document any suggestions the group makes on how to improve the content of the CBOV training curriculum.

Note to the trainer: Use of a video camera is optional. If you think it will be helpful, you can video the participants conducting their sessions and play this back during the feedback sessions.

It will be important to emphasize to the participants that the CBOV training curriculum is a work in progress and we welcome sites to refine and further develop it to meet the sites’ needs.
Training Day 4

Session 10: Planning Strategy for Community Mobilization Activities

Overview:
CM activities will require an on-going process of strategic planning. This is because the CM component of the intervention is very dynamic and needs to respond to events and conditions on the ground. The CM strategy should also take into account the ideas and input of staff and CBOVs since they will be most aware of community needs. Strategic planning meetings will therefore be held regularly with staff and with CBOVs. In this session, we will present a model of how this strategic planning can be conducted.

SOP Reference:
Section VI.E

Time:
1 hour

Objectives:
By the end of this session, the participant will be able to:
1. Describe the role strategic planning will play in the CM process.
2. List the steps to accomplishing strategic planning

Materials:
- powerpoint
- flip chart, paper, markers
- Appendices 4 and 5

Delivery:

1. Introduction
The trainer introduces the session by explaining the importance of collaborative strategy-building that staff and CBOVs will undertake together. Every three months, a strategic-planning workshop will be held with CBOVs. Staff should hold strategic planning sessions among themselves at least as often. In this session, we will discuss the strategic planning process.

2. Strategic planning process
The trainer outlines a model for the strategic planning process. The model requires

What is the problem or challenge?
Participants should identify the problem or challenge. The problem must be solvable and one the participant can impact. It should be important to solve but reasonable in scope.

What is the goal?
Participants must focus beyond the problem and establish a goal. The goal should be clear, measurable, and realistic.
Analyze the force field

In *The Winning Trainer* (Gulf Publishing, 1989), Julius E. Eitington described it this way: "Force field analysis … says to us: ‘Hey, don’t try to come up with a solution or change a situation before you know what forces at work underlie it. Be an expert diagnostician first, and then you’ll be a much better problem solver or change agent. So discern carefully the forces that are favorable to your desired goal (the driving forces) and those which are unfavorable (the restraining forces).” First have participants identify "restraining forces" that prevent solving the problem. Focus on major hurdles, such as lack of time, unavailability of materials, and power struggles among community structures or community members. Next, identify the "driving forces,” which are the positive forces propelling the work forward.

**List Action Steps and Timelines**

Removing the restraining forces (or hurdles) is key to resolving a problem. Each restraining force must be addressed with one or more action steps. For example, if "lack of time" is a restraining force, list action steps aimed at carving out time. Once participants understand that restraining forces must be dealt with in the action steps, they may wonder how many steps to include. The detail in an action plan varies depending on one’s planning style.

**Plan Milestones and or Progress Checks**

Participants often wonder about the difference between a milestone and an action step. A milestone is a turning point that results from the action steps. For example, a milestone might be completing an important set of guidelines, distributing a survey, gaining consensus on a big issue, or holding an important event. Tracking progress can be done in myriad ways: Keeping a log, assembling an album of pictures or student work samples, collecting agendas or notes from team meetings.

**List Needed Resources**

Preparing a list of needed resources helps participants be realistic about the action plan. Examples of resources might include: funds, approval or support from particular people, expertise, books to read, places to visit, a network, or specialized training.

**3. Applying the model process to strategic planning for staff and CBOVs**

The group should discuss how this model can be applied to strategic planning for CM activities. Practice using the strategic planning form (see Appendix 3). Note that Appendix 3 is an tool sites can use to guide the strategic planning session. It is for site’s use only and does not need to be submitted to

**4. Brainstorm CM Activities Likely to be used**

Use the matrix in Appendix 4 to brainstorm the likely CM activities to be included in the CM strategy.

Note that Appendices 3 and 4 are tools sites can use to guide the strategic planning session. They are for the site’s use only and do not need to be submitted to the intervention committee.
Session 11: Facilitating Support Meetings for CBOVs

Overview:
Regular support meetings will be held with CBOVs after their initial training. Support sessions will be a crucial part of motivating, supporting, and providing on-going training to CBOVs. During support sessions, staff will also be able to help monitor the CBOV work and document progress made to date. Support meetings will also provide time for staff and CBOVs to set goals, plan activities, and reflect on the progress made to date.

SOP Reference:
Section VI.D. (last paragraph)

Time:
1 hour

Objectives:
By the end of the session, participants will be able to:
- 1. Describe the purpose of support sessions
- 2. List a number of activities support sessions may include

Materials:
- ☐ powerpoint
- ☐ flip chart, paper, markers

Delivery:
1. Objectives of Support Meetings
The trainer should lead the group in a discussion of what objectives support meetings can achieve. These should include but are not limited to:

- ➢ Motivating CBOVs to stay involved in the project
- ➢ Helping CBOVs to problem-solve challenges they may be facing in the field
- ➢ Building on information given to CBOVs in the initial training
- ➢ Building on skills in communication and facilitation that CBOVs need in order to diffuse the innovation.

2. Support Meeting Content
It will be important that each support session have a clear agenda or lesson plan. The content of the support meetings has not yet been formalized. The trainer will lead the group in brainstorming content areas that support sessions should include. These may include but are not limited to the following:

- ➢ Progress reports from the CBOVs
- ➢ Trouble-shooting challenges
- ➢ Creating or revising strategy
- ➢ Further training in communication strategies
- ➢ Further training in HIV prevention issues
- ➢ Further training in how to organize and facilitate events
Team building among CBOVs

For each proposed activity, the group should relate it to one of the objectives talked about earlier.

3. Frequency of Support Sessions
Support sessions should begin for CBOVs within a couple of weeks of the end of the 4-day training. Their frequency can be adapted for the needs of the sites but we recommend weekly or every two-week sessions during the 3 months immediately following the training since this is a time when CBOVs will need a lot of support in order to keep up their motivation. As the intervention progresses, the frequency of support sessions can be lessened to a monthly meeting; however, sites should feel free to plan the frequency of the sessions according to how they see the CBOVs functioning. We don’t recommend that the meetings take place any less frequently than monthly.

4. Documenting Support Sessions and CBOV Activities
-please refer to CM QA/QC Manual.
Session 12: Developing and Communicating Messages for Promoting the Innovation

Overview:
CM staff members and CBOVs will spend much of their time communicating messages about the innovation to community members. Staff and CBOVs will need to develop messages that are appropriate to their sites and communicate them in ways that respect local values and sensitivities. In this session, we will explore the process of developing and communicating messages for promoting the innovation.

Time:
3 hours

Objectives:
By the end of the session, participants will be able to:
1. Identify several potential promotion messages targeted at individuals in different stages of the innovation adoption process.
2. Understand the process through which staff at the site can develop and practice delivering messages on an ongoing basis.

Materials:
- powerpoint
- flip chart, paper, markers

Delivery:
1. Developing Messages (1 hour)
The trainer will work with the group to come up with a list of general themes that they want the promotional messages to revolve around. These themes should include, but are not limited to:

- The benefits of knowing one’s HIV status
- The benefits of participating in PTSS
- The role of VCT and PTSS in reducing HIV risk behavior in the community
- Acceptance of PLWHA in the community

Next, the trainer should divide the group into sub-groups and assign one or more themes to each group. The groups should begin the process of developing messages that address the theme. As they develop messages, the participants should pay particular attention to making sure their messages are appropriate for the different stages of adoption (according to DOI). These are (see SOP Section III.C):

- Knowledge
- Persuasion
- Decision
- Implementation
- Confirmation

Each group should come up with messages around their theme that address individuals in each of the phases.
2. Sharing of Messages (1 hour)
The groups should come back together and share the messages they have created so far and explain how each one addresses both the theme they were assigned and the DOI phases of adoption. The group should provide feedback and help in the process of refining these messages.

3. Role-Plays (1 hour):
The trainer asks participants to role-play scenarios in which they have to use the messages they have created so far. These role-plays should focus on scenarios that staff members are likely to find themselves in and should be as realistic as possible. These may include:
Talking to someone outside the mobile VCT unit who is undecided about whether to take part in testing (imagine this person is in the persuasion phase of the adoption process).
Talking to a group of religious leaders in the community who want to know more about what we are promoting (imagine these people are in the knowledge phase).
Talking to a group of youth (imagine the youth are in the decision stage).
Talking to a pregnant woman (imagine she is in the implementation stage).
Talking to a man at his first visit to PTSS services (imagine he is in the confirmation stage).

Note to trainer:
It will be important for you to design role-play scenarios carefully so that the participants know exactly what situation they are in. This will help the participants be specific in playing their parts and make the role-play exercise much more useful.

4. Post Role-play Discussion:
The trainer invites discussion on the role-plays as each one finishes. Answer the following questions:

- Did the message work as it was intended?
- What communication strategies did the staff member use?
- What went well in the communication encounter?
- What areas needed improvement either in the content of the message or in the technique of the staff member?
Session 12: Motivating CBOVs

Overview:
One of the biggest challenges facing the CM staff will be keeping the CBOVs motivated to stay involved in Project Accept and to sustain good quality community mobilization work over time. While enthusiasm among volunteers is typically high when they first become involved, their interest often fades as time passes. In this session, we will examine the reasons why volunteers often lose motivation and the various tools available to the sites to ensure this doesn’t happen.

SOP Reference:
Section VI.F

Time:
2 hours

Objectives:
By the end of this session, the participants will be able to:
Describe the main reasons why volunteers lose enthusiasm over time.
Identify several ways in which the site staff can encourage volunteers to stay involved and invested in the project over time.
1. Outline a site-specific strategy for motivating CBOVs.

Materials:
☐ powerpoint
☐ flip chart, paper, markers

Delivery:
1. Understanding the Problem
The trainer leads a discussion about the underlying causes of lack of motivation among volunteers. The discussion may include the following issues as well as others:
➢ Role confusion (what is my role as a volunteer? What is expected of me?)
➢ Inefficiency in how the project is run (volunteer time being wasted)
➢ Lack of technical expertise among the staff (staff not credible)
➢ Volunteer feeling unprepared or lacking in appropriate skills to do what is asked
➢ Distrust of the staff’s motivations
➢ Being talked “down to” by the staff
➢ Not having a voice in decision-making
➢ Lack of opportunities for personal benefit

The group will have many other suggestions, based on their experiences, of ways in which volunteers lose motivation. Write down all the suggestions from the group.
2. Strategies for Solving the Problem
The trainer now leads a discussion in which the group takes each of the problems listed in the exercise above and talks about what strategies can be used to overcome them. The trainer should be careful to make sure that strategies suggested are realistic for Project Accept (for example, incentives should not exceed budgetary constraints and be appropriate for the cultural context).

3. Documenting the Site Strategy
The trainer will ask each site to begin the process of documenting a specific strategy for motivating CBOVs. The strategies can differ between sites but must be grounded in an analysis of what the anticipated challenges are and specific strategies for overcoming them. This document should be a work in progress and re-visited by the site staff on at least a quarterly basis to determine if the strategies are working as expected or if they need to be adjusted.
Training Day 5

Session 13: Documenting Community Mobilization Activities

Overview:
It will be very important for community mobilization activities to be documented in as much detail as possible. Data of this type, often called “process data” will help us to explain how our CM strategies worked on the ground. Documentation of this type will be enormously important for the study as a whole because it will allow us to characterize both the quantity and quality of the CM component of the intervention. In the event that we find the CBVCT intervention effective or ineffective, process data of this type will help us to understand why it was a success or failure. In this session we introduce the methods for documenting CM activities.

Time:
2 hours

Objectives:
By the end of this session, the participant will be able to:
Articulate the reasons why process data is vital to our understanding of the study outcomes
Describe the ways in site staff will document CM activities.
Explain the purpose and use of the various forms.

Materials:
- Documentation Forms
- Utilization Manual

Delivery:

1. Overview
For the ToT, a member of the Utilization sub-committee will join the group and introduce the various forms that have been developed to document CM utilization.

2. Outside of the TO T meeting use the Utilization Manual to present an overview of the CM Utilization Forms to staff.
Session 14: Wrapping Up Unfinished Business

Use this session to wrap up and bring closure to the training as a whole. Verify that there are no lingering questions or points of confusion for participants. Briefly summarize the concepts presented in the training and thank participants for all their hard work and attention.