INSPIRING CHANGE
LEADERSHIP
TRAINING

A curriculum for preparing African American lived experience research leaders.
AUTHORS:
The following members of the Leadership Advisory Board created this curriculum.

Lindsay Sheehan
Sonya Ballentine
Sylvia Cole
Christopher Ervin
Jamie Eskridge
Cheryl Metcalf
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This project was funded by Patient Centered Outcomes Research Institute (PCORI) award IIT-3974

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ABOUT THE AUTHORS

Lindsay Sheehan is Senior Research Associate at Illinois Institute of Technology. She helped develop the Inspiring Change CBPR curriculum and worked on several CBPR projects related to health disparities and mental illness.

Sonya Ballentine is the patient co-investigator on this project and also manages a CBPR project on healthy lifestyles for African Americans with mental illness. Ms. Ballentine graduated from Georgia State University and worked in the business sector before being hospitalized and diagnosed with bipolar disorder in 2007.

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PREFACE

This training is designed as a 2-day (total: 12 hour) seminar. Trainers should recruit trainees who are in the process of recovery from a serious mental illness. Potential participants should have the following characteristics:

- Stable symptoms
- Interest in leading a project (not necessarily experience)
- Openness to learning
- Basic communication, reading, and writing skills
- Commitment to attending the sessions

Supplies:

- Printed training handouts
- Pens
- Coffee, snacks, and lunch
- Clock/timer
- Nametags
- Whiteboard (optional)

Location and Set-up:

- Room with tables for small group activities and large group discussions
- Powerpoint projector and screen

Pre-Assessment: Trainees should complete the pre-assessment questions before beginning the training (Time: 15 mins)
Opening
(Time: 15 mins)

Introductions

- Welcome trainees and introduce yourself.
- Trainers ask trainees to briefly introduce themselves.

Purpose

Explain the purpose of the training:

- African Americans with mental health challenges (i.e. lived experience) have unique healthcare needs and should be involved in research to help reduce unfair barriers.
- We believe that professional researchers need to partner with lived experience people to do their best research
- Lived experience partners need to be prepared with leadership skills and supported in leadership role. That is where this training comes in and where you come in.

Expectations

- Turn cell phones on vibrate during sessions
- Limit phone calls and personal business to break time
- Respect opinions of others
- Take turns speaking
- Practice your new skills and knowledge in your everyday life

Explain that everyone can use the leadership skills in their lives (jobs, volunteer work, in church, with family, etc.) beyond the research projects.
Session 1

Introduction to CBPR

Define Community-Based Participatory Research (CBPR) (10 min)

Present the parts of CBPR by presenting each letter at a time from Handout 1: CBPR, and engage attendees in discussion of each part.

- C – Community: Talk about specific communities by name. Ask participants to engage by responding with community of residency—e.g. Roseland, Englewood, South Shore etc.
- B – Based: Foundation of all change and empowerment starts with you.
- P – Participatory: You drive it. You do it. You solve it.
- R – Research: As leaders, your responsibility will be to find the facts, ask the questions and create the solutions.

CBPR Scenario (10 mins.)

Tell participants that over the next two days they will be using an example CBPR scenario to learn about project management and leadership. Read both of the scenarios on Handout 1: Introduction to CBPR aloud. Ask trainees if they have questions or comments about the scenarios. Pick one of the scenarios to use as an example throughout the remainder of the training.

More about CBPR (10 mins)

Trainers go over Handout 2: CBPR Principles and check for understanding.

CBPR Role Play (5 min)

Conduct a role-play (below) to show how all members on the research team (lived experience person, researcher and providers) will learn from each other.

Ask trainees to think of Scenario 1 or 2 (above) while they are watching/participating in the role play.

Lived Experience Leader: “I have lived experience—I’ve been diagnosed with bipolar disorder and also have to manage my high blood pressure. I know lots of people in my community that have the same or similar challenges. I told the researcher how much money we should offer participants in the study. I said we give them to travel cards so they could make it appointments and gave advice in how we can find people interested in the study. I’ve been learning more about research—for example—what a control group is and how to do an IRB application. I’ve learned about how to write grants.”
**Academic Researcher:** “I’m the researcher from State University. When I work with a CBPR team, I really depend on them to tell me when something won’t work. I wanted to make a 5-day training, but the rest of the team said there’s no way people in the real world will want to come. The lived experience leader really build trust with the research participants and the provider leader worked with their agency so we could hold the training there.”

**Provider:** “I’m a nurse at Abbott Clinic and I see people with high blood pressure every day. While I’m really busy and often don’t have as much time to work on the project as the other leaders, I can tell the team about the best ways to measure blood pressure and how our clinic works. I talk with management at the clinic and get them excited and supportive of the project.”

**CBPR Reflection** (5 min)

Ask the question: What are some of the community issues going on in your neighborhoods?

Tell the trainees that the topics that they just generated might be something that they can research. If the topics people suggest are not related to health care, help them figure out how the issue they bring up could related to health care for African Americans with mental illness.

**Strengths Handout** (10 mins.)

- Read the definition of CBPR aloud from Handout 3: Strengths.
- Ask participants to complete the bottom of Handout 3: Strengths and then discuss as a group, asking participants for examples.

**Duties of Lived Experience Leader** (10 mins.)

Turn to Handout 4: Duties of Lived Experience Research Leader. Explain what a lived experience leader will do:

The lived experience leader will be the most accessible among the leadership team. It will be important to create healthy boundaries as well as connect on a more personal level with the other team members. This will require that the person with lived experience be able to complement the team member strengths and weaknesses while completing specific tasks.

Give specific examples for each task on Handout 4: Duties of Lived Experience Leader.
Session 2
What is Leadership?

Definition of Leadership (10 min)
- Read the definition of leadership from Handout 5: Introduction to Leadership
- Ask participants to list what they think a leader should do.

Three Leadership Styles (20 min)

Explain that:
- There are many different kinds of leaders and there are many different ways for a person to be a leader.
- Each person develops their own leadership style.
- Each person can change their style to fit the group they are leading.
- Research has found there are several common leadership styles.

Guide the group in reading about these styles from Handout 5 and thinking about the pros and cons of each style. List these on the board as a group if possible.

Ask the group: Which leadership style would you want to use? Why?

Transformational Leadership (30 min)

- Go to Handout 6: More about Transformational Leadership and explain that in most cases, transformational leadership will be the best approach.
- Together go over the four main parts of transformational leadership in Handout 6.
- Explain each to the group and invite discussion.
- Ask trainees: What does it mean to be a project leader? What would you do?
Session 3
Communication Skills

Communication Skills Introduction (10 mins.)

Explain that persons with lived experience will be required to communicate with the three (3) individuals as follows:

**Research Co-Leaders:** Co-leaders usually include the academic researcher and/or a representative from the community partner agency.

**Community Organizations/ Agencies:** Agencies will support the project and will usually be providers of mental and physical health services.

**CBPR Team Members:** Additional persons with lived experience and other stakeholders that will attend the meetings and provide insight.

Communication Skills Practice (80 mins)

- Trainers explain listening skills:
  - Good listening skills will be essential when using effective communication strategies. This will assist the lived experienced leader in understanding what other individuals are saying. These skills will help the person with lived experience feel confident that they have a clear account of what was heard.
  - Explain that categories of good listening skills include: attending, following, and reflecting skills.
- Start with attending skills on Handout 7: Go through each attending skill and role-play each with co-leader or with volunteer participant.
- Get participants into groups of three and practice attending skills using the end of Handout 7: Communication Skills. (20 min.)
- Next present and role-play the following skills. Get back into small groups for practice. (20 min)
- Present and role-play the reflecting skills. Practice in small groups.
- Finally, present and role-play the constructive feedback (sandwiching skill). Practice in small groups. (20 min.)

Reflection (10 min)

- Reflect on the activity by asking trainees to circle the skills from Handout 7 that they would most like to improve on.
- Discuss responses in the large group.
- Ask trainees to think about situations in their daily lives where they can practice these skills (e.g. with family or friends)
**Alternative Scenario**

**Alternately**, have one person is the lived experience leader, one person is the CBPR team member, and one person is the timekeeper(observer). Then small groups switch roles to practice. Have trainees role play the following scenario.

**Lived experience leader instructions:** When you are pretending to be the lived experience leader, remember that you need get the project done, while keeping the team members happy and motivated. Use attending skills to listen to the team member’s problem.

**CBPR team member instructions:** Pretend that you come to the leader after the meeting and you are upset. You tell the leader that whenever you meet with the team, another team member (Jenny) is always annoying you. She thinks she is better than everyone else and doesn’t listen to your ideas. This makes you feel like you shouldn’t come any more and don’t have anything to offer.

**Timekeeper/observer:** Watch the interaction, keep time for when to switch roles, and give feedback.
Session 4

Project Management

Introduction (10 min)

- Use the common research project scenario and explain (using Handout 8: Project Management) what tasks the leaders will have to do.
- Using the power point/handout, give examples from the scenario project.
- Ask trainees to check which ones they feel comfortable doing and discuss as group.
- Ask trainees to identify other tasks not on this list.

Time Management (30 min)

- Go over Handout 9: Time Management and give examples from perspective of lived experience.
- Ask people to give examples of what strategies they use for managing their time.
- Explain that “deltas” are areas that they can change or work on. Give examples of how you (the leader) personally improved time management.
- Ask participants to star the items on the fact sheet that they want to work on.
- Talk about how they can improve in time management.
- On the second page of Handout 9 read the story at the top together
- Instruct trainees to fill out the steps that would take to plan for the training.
- Discuss these as a group.

Delegating (10 min)

- Explain that delegating involves identifying tasks, identifying strengths, matching the person with the task, and making the “ask.”
- Give an example, based on the research project scenario.
- Ask participants to complete Handout 10: Delegating
- Discuss the responses as a group.

Planning for Sessions and Creating an Agenda (10 min.)

- Turn to Handout 11: Sample Agenda
- Point out the following components: date, time, topics, time-frames.
- Turn to Handout 12: Agenda Planning.
- Explain that a milestone is something that needs to be done for the project.
- Read through the sample timeline on Handout 12 and explain each task.
- Ask trainees to think about the smaller steps they will take to complete the milestone.
- Then ask trainees to use the agenda items at the bottom of Handout 12 to fill in agendas for the first three CBPR meetings
- Discuss as a group.
Session 5

Leading a Meeting

Introduction (5 min)

- Explain that a facilitator leads the meetings. Often the person with lived experience will be the facilitator or co-facilitator at meetings.
- Tell trainees that it takes lots of practice to be a good facilitator and they should not expect to do well right away

Tasks of Facilitator (10 min)

- Read the tasks of facilitator in Handout 13: Leading a Meeting
- Give examples of specific problems that might arise for each task.

How to Engage a Group (20 min)

- Read “How to Engage a Group” in Handout 13: Leading a Meeting.
- After each bullet point, stop and ask trainees to give examples if they have ever participated in these activities.
- Ask volunteers to role-play each engagement strategy for the group.

Basic Meeting Rules/ Comforts (25 min)

- Read the “Basic Meeting Rules” section in Handout 13: Leading a Meeting.
- Ask trainees to get in small groups of three and practice leading the group in setting basic meeting rules. Have other group members give constructive feedback.
- *For extra practice if time allows, have trainees take turns leading another small group activity. Trainees could practice with previous sessions from the leadership training, or could use the agenda they created from the previous session to practice leading a CBPR group.
Session 7
Professionalism and Self-Care

Introduction (5 min)

- Read the definition of professionalism and put on the board or power point.
  - Professionalism is the expected behavior of the workplace.
- Explain that as a leader, you use professionalism to make a good impression on community partners, other leaders, and to help the rest of your team develop professionalism. Your research participants will trust you more if you behave professionally.

Identifying Professional Activities (15 min)

- Ask the group to give examples of professional and unprofessional behavior for each issue in Handout 14: Professionalism Activity.
- Write a master list on the board or have trainees take notes. Ask trainees to circle the issues they most want to work on improving.

Tips for Professionals (10 min)

- Read Handout 15: Tips for Professionals together.
- Tell trainees they can use mentors to help them build professionalism over time.
- Ask them to use the Handout 15: Tips for Professionals to help them think about these issues in the future.

Practicing Professionalism (30 min)

- Turn to Handout 16: Practicing Professionalism.
- As a group, read the stories about Gary aloud and discuss the two questions listed.

Self-Care (20 min)

- Ask the group to look at Handout 17: Self-Care.
- Explain that the National Wellness Institute has identified six parts of wellness.
- Read these aloud.
- Ask trainees to fill out the handout about what self-care activities they currently perform and what activities they might want to do.
- Discuss as a group.
- Read tips for managing stress.
- Ask trainees to write down what else they can do to manage stress.
Session 8
Mentorship
(Time: 60 mins)

Introduction (5 min)
- Trainer explains the definition of mentoring from Handout 18: Mentorship.
- Ask the group what type of activities mentors and mentees do together.

Mentor and Mentee Roles (30 min)
- Read the rest of Handout 18 together.
- Ask the trainees to answer the questions on Handout 18, “What do I expect from my mentor”
- Discuss the responses.
- Ask participants to brainstorm ways they might find a mentor for themselves.
Session 8
Solving Problems and Managing Conflicts

Introduction to Problem-Solving (5 min)

- Introduce problem-solving to the group by explaining that problems will come up. You might not always know what to do, but when you use these steps to solve a problem, you will be more likely to have a good solution.
- Go through each step of the problem-solving model on Handout 19: Solving Problems together. Use an example problem to explain each step.

Problem-Solving Practice (30 min)

- Have trainees get in small groups and give them a problem to solve (see below).
- Tell trainees to complete Handout 20: Your Turn to Solve a Problem.

Use the following examples for small group work:

**Problem 1**: Afraid that you won’t meet deadlines because the group is not being productive.

**Problem 2**: People are not showing up for the group.

**Problem 3**: Group members disagree on how to do the project.

**Problem 4**: Team has problems recruiting enough participants.

**Problem 5**: Team members are making mistakes when collecting the data.

**Problem 6**: There is not a private space for conducting the interviews.

- Come back to the group and discuss.

Introduction to Conflict Management (5 min)

Read the introduction on Handout 21: Conflict Management

Help trainees distinguish between assertiveness and aggression.

Ways of Managing Conflict (30 min)

- Ask trainees to take some time and look at the figure on Handout 21.
- Ask them to reflect on what they think they would normally do in a conflict.

Ask trainees what they think the preferred way to handle conflict is.

- Explain that in a leadership role, you will need to all of these at different times.
- Take time to explain the figure again for those that may have difficulty understanding.
- Read each of the description of 5 ways of handling conflict.
• Go through each term and present real life pros and cons of each.

Examples

  o Positives of Avoiding: you would say “now is not the right time, can I get back to you?” When you get back with them, you ask their permission- is now a good time?”
  o Collaborating sounds like great word, but one of the biggest things it’s time consuming—doesn’t work well with pressing issue with limited time.
  o Sometimes I have to accommodate people—it makes it seem passive, but it’s something a leader will have to. I will accommodate you now, but I might come back later.

Practice Managing Conflicts

• Put trainees into small groups.
• Give them examples of conflicts and discuss what ways they would use to manage these.
  o Conflict 1: George, the academic researcher, will never answer you questions or tell you about the project. He always brushes you off and says he’s too busy right now to explain, but you can talk about it another time.
  o Conflict 2: One of the team members is being insulting to another team member, by making underhanded comments in group.
  o Conflict 3: Everyone else in the group can meet on Thursdays, but one member can never come because she has to work.
  o Conflict 4: One team member wants to help on the project, but does not have very strong computer or reading skills to do the work correctly. He keeps asking you if he can help.
  o Conflict 5: Ask the trainees to think of other conflicts they might need to resolve.
• Come back to the group and discuss
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Handouts for Trainees
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Handout 1: Introduction to CBPR

CBPR Scenario 1

African Americans with serious mental illness are more likely to have high blood pressure. A community-based participatory research (CBPR) team wants to learn the best way to improve habits of African Americans with serious mental illness. There are two programs that have been used in community health centers, but no research has looked at how these programs work for African Americans. The CBPR team wants to compare the two programs (Program A and Program B) to see which one will lead to improve blood pressure and will be preferred by African Americans with lived experience.

CBPR Scenario 2

A case manager feels that his clients need training to advocate for themselves during doctor visits. He recruits a CBPR team to design an advocacy training. The team holds interviews and focus groups with doctors, case managers and clients to identify ways to improve self-advocacy. The team develops a brief self-advocacy training for clients based on their research.
Review the principles of CBPR that have been adapted from Minkler & Wallerstein, (2008). Discuss examples of each principle.

<table>
<thead>
<tr>
<th>CBPR Principle</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CBPR brings researchers and community members together during all parts of</td>
<td>• Have meetings (weekly, monthly, etc.)</td>
</tr>
<tr>
<td>the research process.</td>
<td>• Write a grant together</td>
</tr>
<tr>
<td></td>
<td>• Decide what survey questions to use</td>
</tr>
<tr>
<td></td>
<td>• Write a paper together about results</td>
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<tr>
<td>2. CBPR balances research and action for the benefit of all partners.</td>
<td>• Clinic wants to provide services that work</td>
</tr>
<tr>
<td></td>
<td>• Patients/lived experience want services that they like</td>
</tr>
<tr>
<td></td>
<td>• Research helps find out which services are preferred by patients and</td>
</tr>
<tr>
<td></td>
<td>which services work best.</td>
</tr>
<tr>
<td>3. CBPR recognizes communities.</td>
<td>Each community has something they share in common, for example:</td>
</tr>
<tr>
<td></td>
<td>• Neighborhood</td>
</tr>
<tr>
<td></td>
<td>• Illness</td>
</tr>
<tr>
<td></td>
<td>• Racial identity</td>
</tr>
<tr>
<td>4. CBPR uses the opportunities and talents within the community, recognizing</td>
<td>Talents</td>
</tr>
<tr>
<td>that everyone has something to offer.</td>
<td>• Socially-connected</td>
</tr>
<tr>
<td></td>
<td>• Respected</td>
</tr>
<tr>
<td></td>
<td>• Spiritual</td>
</tr>
<tr>
<td>5. CBPR allows researchers and community members to learn from each other and</td>
<td>• They discuss things with each other and keep an open mind</td>
</tr>
<tr>
<td>get results.</td>
<td></td>
</tr>
<tr>
<td>6. CBPR is a long-term process that requires commitment and dedication.</td>
<td>• There may be times when someone else may need to step up when one</td>
</tr>
<tr>
<td></td>
<td>team leader or team member cannot be there.</td>
</tr>
<tr>
<td></td>
<td>CBPR focuses on issues in the local community. CBPR pays attention to the many factors that contribute to those issues.</td>
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</tbody>
</table>
| 7. | In CBPR, community research partners share their research findings for the benefit of all people involved. | Hold a community event/ seminar  
Give an interview with a local newspaper |
| 8. | CBPR tries to improve the health care system through open and consistent communication between researchers and the community. | Change the way the clinic does business  
Help people improve blood pressure |
| 9. | CBPR promotes the rights of community members to make their own choices and in many ways empowers all persons involved in the process. | You feel better because you can help.  
You have important work to do. |
| 10. |   | “Great leaders never accept the world as it was and always work for the world as it should be”
Condelleza Rice |
Handout 3: Strengths

Read the definition of CBPR below and write down what strengths you bring to the team.

Community-based participatory research (CBPR) is a collaborative approach to research that involves all partners in the research process. This research format recognizes the unique strengths that each partner brings. CBPR begins with a research topic of importance to the community. CBPR combines knowledge and action for social change to improve communities and eliminate disparities.

(Adapted from W. K. Kellogg Foundation’s Community Health Scholars Program, 2001, p. 2)

What strengths will you bring to your CBPR team?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Handout 4: Duties of Lived Experience Research Leader

- **Facilitation**: co-lead the team meetings
- **Liaison between team members and organization**: talk with the agency about where we can meet, who needs to approve the project and how you can recruit participants.
- **Recruitment**: Design flyers, handout flyers, call participants and explain the study
- **Data collection**: Help participants fill out surveys, give presentations, interview people
- **Organization**: Make sure the project is on time, people get paid, people are trained, problems are solved, etc.

"You can’t lead where you haven’t been."

Willie Taplin Barrow
Handout 5: Introduction to Leadership

Leaders help the group to...

(Bass, 1985, 1998)

Three Leadership Styles

1. **Laissez-Faire (“lay-zay-fair”) Style** (Free-for-all)

   Laissez-faire means to “let go” in French. In this leadership style, the leader provides very little structure or guidelines, leaving followers to fend for themselves and make decisions.

2. **Transactional Style** (Same old- Same old)

   This style of leadership uses rewards and punishments to get things done. Transactional leaders try to do things the way they’ve always been done rather than making big changes.

3. **Transformational Style** (Move and shake)

   The transformational leader works with group to identify what changes are needed. The transformational leader creates a vision and makes changes by working together with group members. This leader focuses on motivation, morale, and job performance of followers.

---

“Be more concerned with your character than your reputation. Because your character is what you really are, while your reputation is merely what others think you are.”

Jay-Z

**Discussion:** Can you think of at least one person (political leader, past supervisor) who uses each style?

On the next page, work as a group to complete the pros and cons of each style.
<table>
<thead>
<tr>
<th>Leadership Style</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laissez-Faire</td>
<td></td>
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<tr>
<td>Transactional</td>
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<td></td>
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<tr>
<td>Transformational</td>
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</tbody>
</table>

Which leadership style would you want to use? Why?
Handout 6: More about Transformational Leadership

1. **Give each person on the team individual attention.**
   a. Pay attention to each team member’s concerns and needs
   b. Act as a mentor or coach
   c. Provide empathy and support
   d. Keep communication open
   e. Recognize strengths of each team member

2. **Provide group members with challenges to solve**
   a. Ask for group members ideas
   b. Encourage creativity in the group
   c. Help group members think more independently
   d. See problems as opportunities for learning and growth

3. **Inspire and motivate group members**
   a. Explain your vision to the group
   b. Set high standards for group members
   c. Tell and show how excited you are about the project
   d. Explain what the meaning of the project is and why it’s so important.

4. **Be a role model for group members**
   a. Be an example of ethical behavior
   b. Have pride in the group
   c. Gain respect and trust of group members

What does it mean to be a **project** leader?
Handout 7: Communication Skills

ATTENDING SKILLS

Attending skills are the act of communicating that you are fully present in the moment without the use of words. The result of using these skills is that the speaker is encouraged to continue talking about their concerns or feelings in a comfortable manner.

- **Engaging body language**: Face the person speaking and do not sit or stand with folded arms. Simple motions of nodding your head or leaning your body forward can let the speaker know you are paying attention.
- **Facial expressions**: Be aware of your facial expressions while listening, and ensure that your expressions are appropriate to the speaker’s account of events.
- **Eye contact**: Continue to maintain natural eye contact with the speaker while he/she talks (e.g. no glaring, staring or giving the side-eye).
- **Avoid distractions**: The lived experience leader should try to find an area limited to interruptions and a space where the person speaking can talk freely.
- **Time sensitivity**: When you are leading a research project it is important to take the appropriate time needed to listen to what a person is saying and respond appropriately. Avoid asking individuals a question when they are in a hurry, do not wait until the last minute to ask a question. Likewise, do not give answers to questions when you are pressed for time, instead repeat the question and schedule a time to respond.
- **Considerations**: During interactions with other individuals turn cell phones off or on silent mode. Do not text and avoid talking to 3rd parties. Inform the person you are having a conversation with of any possible interruptions before the meeting.

FOLLOWING SKILLS

Following skills are the act of listening to what the person is communicating without interfering while moving in the same direction as the speaker. The responsibility of the lived experience leader is to fully understand what is being communicated from the speaker.

- **Door openers**: Good door openers provide an invitation for a person to talk freely, is followed by silence and provides the individual an opportunity to respond. For example, “What is your reason for participation?”, “Tell me about yourself.”, “What is your work experience?”
- **Simple Encouragers**: Persons with lived experience often lead meetings, and when listening to team members use statements, such as “right” or “go on” or a nod of the head demonstrates to the person you are listening.
- **Questioning**: Questions can help direct the person speaking. Open-ended questions encourage conversation. This type of questioning begins with words such as, “What”, “Why”, or “How”, encouraging the speaker to continue in the conversation.
- **Attentive Silence**: Being quiet shows the person speaking that you are listening and supportive. Use natural eye contact and simple encouragers can let the speaker know you are listening, while allowing the speaker do most of the talking.
REFLECTING SKILLS

This type of listening skill involves repeating the speaker’s statement.

- **Paraphrasing**: Focuses on the content of what was said while restating the core of the speaker’s statement in the listener’s words. The statement the listener provides is a concise and thorough message.
- **Connecting Feelings & Meanings**: By listening for feeling words and observing body language, this allows the listener to hear the speaker’s feelings and repeat them back to the speaker.
- **Summary Reflections**: By summarizing the conversation, the listener can reflect topics or common statements highlighted by the speaker.

CONSTRUCTIVE FEEDBACK: Sandwiching Skill

- Begin with a compliment of a job well done
- Add a solution to an ongoing concern
- End with a thank you of all the work up until that point
Before you begin, review the first part of this handout. Choose a speaker from the group. All others will be listeners.

The speakers should talk about a time when they have been slightly worried or upset. For example, the speaker could talk about a time when they were nervous about meeting a new person, starting a new job, attending a group, or giving a speech. Listeners should use attending, following, and reflecting skills to demonstrate and practice their listening skills.

After you are finished, take a minute to complete the following questions:

As the **listener**:  

What did the speaker say?

- ____________________________________________________________
- ____________________________________________________________
- ____________________________________________________________

What did I do or say that felt/seemed supportive?

- ____________________________________________________________
- ____________________________________________________________
- ____________________________________________________________

What would I do or say differently next time?

- ____________________________________________________________
- ____________________________________________________________
- ____________________________________________________________

As the **speaker**:  

What did the listener do well?

- ____________________________________________________________
- ____________________________________________________________
- ____________________________________________________________

What are my suggestions for the listener to do differently next time?

- ____________________________________________________________
- ____________________________________________________________
- ____________________________________________________________

Try this exercise multiple times with different speakers and listeners.
Handout 8: Project Management

**Project Management Tasks**

- Make appointment reminder calls
- Return phone calls and emails
- Plan days and times for the meeting
- Reserve meeting rooms
- Print materials for the meeting
- Prepare room with coffee and snacks
- Schedule research participants
- Make recruitment flyer
- Hand out flyers
- Prepare agenda
- Prepare for group session
- Take notes/minutes
- Delegate/ ask other team members to do tasks
- Make a detailed timeline
- Others? __________________________

“Faith is taking the first step even when you don’t see the whole staircase.”

Martin Luther King Jr.
Handout 9: Time Management

How Can I Be Organized?

- Schedule times during the week to work on the research project only.
- Enter your schedule into your calendar.
- Look at your calendar before you go to bed so you will be prepared for the next day.
- Check your email first thing in the morning to see if any last-minute items need attention.
- Spend the first 5 to 10 minutes of your day writing down to-do list. Break large tasks into smaller steps. Next to each item, write down how long it will take to complete each task.
- Go over your written to-do list and put a star next to the most important items. Start with the starred items.
- Before making or returning a call, write down the things you need to accomplish, so you don’t forget something.
- Stick to your schedule as much as possible, but be willing to re-arrange items as needed.
- If you begin to feel overwhelmed by too many tasks, talk to your mentor, supervisor, or fellow leaders BEFORE you fall behind.
- Take notes during phone calls or meetings.
- When traveling to meetings, overestimate travel times, in case of traffic or public transportation issues.
- Don’t push tasks off for later that can easily be done now. You may forget to do them.
- If you need to reschedule a meeting, do so as soon as possible.

The Job Seems so Big—How Do I Get Started?

Take what you are trying to do and break it into smaller steps. For example, if I need to make a flyer, here are the steps I might take:

1) Find a sample flyer that I can use to start with.
2) Mark changes that I want on that flyer.
3) Use the computer to create the changes I want.
4) Present the flyer to my group for feedback.
5) Make the recommended changes.
6) Take back to the group for final approval.

How Can I Limit Distractions?

- Limit time spent on computer for personal use, especially websites like Facebook, YouTube, and personal email.
- Make personal phone calls during your break or lunch hour.
- Run personal errands before or after your scheduled work hours.
- Turn your phone to vibrate when you are in meetings so you are not tempted to answer during these times.

How Can I Get Back on Track if I Stumble?

- Talk to a mentor
- Connect with your support system
- Stop and reprioritize
Now try it yourself. For your research project, you are having a partner agency come to train your team on data collection. You are in charge of finding a place and time for the training, and for making sure your team members are all there and comfortable. List the steps that you would need to take. Write down how far in advance of the training you would complete each task. Discuss with your group.

Tasks

Step 1: ______________________________

Step 2: ______________________________

Step 3: ______________________________

Step 4: ______________________________

Step 5: ______________________________
Handout 10: Delegating

Read about the two team members below. Decide which one you would match to which task.

**Person 1:** Person 1 is a CBPR team member with lived experience. He is always on time to meetings and has attended every meeting so far. He always listens to others and gets along well with the rest of the team. He has mentioned that he doesn’t have much experience using a computer. He is a sloppy dresser and sometimes does not have the best personal hygiene.

**Person 2:** Person 2 usually attends the meetings, but is often a few minutes late. She loves hosting parties and worked as a marketing assistant in the past. She gets along with the rest of the team, but does have an ongoing argument with another woman in the group who she sees as a show-off.

- Make appointment reminder calls ___
- Reserve meeting rooms___
- Print materials for the meeting___
- Prepare room with coffee and snacks___
- Schedule research participants___
- Make recruitment flyer___
- Hand out flyers___
- Take notes/minutes___
- Delegate/ ask other team members to do tasks___
- Make a PowerPoint presentation___
- Plan an event for the group___
- Hand out recruitment flyers___
- Make coffee for the group___
- Network with providers in the community___

Explain why you made the choices and discuss with the group.

How would you ask that person to do the task?
LEADERSHIP ADVISORY BOARD AGENDA

Tuesday, February 21, 2017
10:00 am – 12:00 pm
Illinois Institute of Technology
Meeting 3

Agenda

I. Review/Approve Minutes
II. Learn about research ethics: Chapter 3
III. Go over informed consent for project
IV. Break
V. Brainstorm questions for focus groups
VI. Plan content for website
VII. Adjournment and Payment
Handout 12: Agenda Planning

Look at the timeline below. Pretend that it is Jan. 1. Based on the timeline, complete the milestone steps and agenda items below.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Projected Start Date</th>
<th>Projected Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop the questions that you will ask the participants in the focus group.</td>
<td>Jan 1, 2016</td>
<td>Feb. 20, 2016</td>
</tr>
<tr>
<td>2. Get permission from the agency to do the focus groups.</td>
<td>March 1, 2016</td>
<td>March 31, 2016</td>
</tr>
<tr>
<td>3. Hold the focus groups.</td>
<td>April 1, 2016</td>
<td>April 15, 2016</td>
</tr>
<tr>
<td>4. Work with the researcher to analyze the results of the focus groups.</td>
<td>April 15, 2016</td>
<td>May 15, 2016</td>
</tr>
<tr>
<td>5. Explain the results to the rest of the team and get their feedback</td>
<td>May 15, 2016</td>
<td>July 1, 2016</td>
</tr>
</tbody>
</table>

For each “Milestone” write down the smaller steps you will need to take to complete it.

1. Develop the questions that you will ask the participants in the focus group.
   a. __________________________________________________________________________
   b. __________________________________________________________________________
   c. __________________________________________________________________________

2. Get permission from the agency to do the focus groups.
   a. __________________________________________________________________________
   b. __________________________________________________________________________
   c. __________________________________________________________________________

3. Hold the focus groups.
   a. __________________________________________________________________________
   b. __________________________________________________________________________
   c. __________________________________________________________________________

4. Work with the researcher to analyze the results of the focus groups.
   a. __________________________________________________________________________
   b. __________________________________________________________________________
   c. __________________________________________________________________________

5. Explain the results to the rest of the team and get their feedback
   a. __________________________________________________________________________
   b. __________________________________________________________________________
Making the Agenda

Using the list at the bottom of the page, fill in the agenda items for the first three meetings.

<table>
<thead>
<tr>
<th>Meeting</th>
<th>Agenda Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1.</td>
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<tr>
<td></td>
<td>2.</td>
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<tr>
<td></td>
<td>3.</td>
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<tr>
<td>2</td>
<td>1.</td>
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<td>2.</td>
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<td>3.</td>
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<tr>
<td>3</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

Agenda Items

- Fill out an application for the institutional review board (IRB) to approve your research.
- Make a consent form for participants to sign.
- Brainstorming questions to ask participants in the focus group.
- Learn about research ethics
- Learn about focus groups
- Break
- Approval of the minutes
- Adjournment and payment
- Make a flyer about the research
- Make up group rules
- Give a background on the project.
- Others?
Handout 13: Leading a Meeting

Tasks of a Facilitator

- Follow the agenda.
- Listen to group members
- Make sure all group members have a chance to participate
- Build consensus among members
- Summarize discussions
- Action plan

How to Engage a Group

- **Small group discussions**: Break people into groups of 2-5 and assign a specific task and time limit. Ask one person in each small group to be the note taker who summarizes work to the larger group.
- **Role plays**: Ask group members to act out an imagined scenario. Role plays can be helpful for learning a new skill (such as how to conduct a research interview) or for getting group members to take the perspective of others.
- **Brainstorming**: In brainstorming, the facilitator asks group members to list ideas and facilitator takes notes.
- **Asking for feedback**: Present group members with written or verbal information and ask them to give critical feedback about the content or about the language. This can be helpful method for developing research surveys.
- **Round robin**: The facilitator calls on each person in the group to give a response to the question.

Basic Meeting Rules/Comforts

You can develop rules together. The way you enforce rules depends on your personal style. You can use humor to diffuse situations, but usually it’s best to use a direct style and emphasize the impact that rule-breaking has on the group (“I lose my thought when cell phones are going off during the meeting—this is a reminder to turn off the phones. You may need to occasionally remind the group of the rules, talk with group members individually about the rules, or review before each meeting. You can have each group member take turns presenting the rules to get better buy-in. Here are some common rules:

- Be on time
- Have an open mind
- Ask questions
- Don’t interrupt others
- No side conversations
- Pay attention—get rid of distractions
- You can disagree with a person’s perspective, but don’t give a personal attack
- Keep on topic
Handout 14: Professionalism Activity

<table>
<thead>
<tr>
<th>Issue</th>
<th>Unprofessional</th>
<th>Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance and punctuality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal appearance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reacting to your mistakes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Helping coworkers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expressing your opinions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Talking about yourself</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Making friends</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dealing with disagreements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gossip</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

"My humanity is bound up in yours, for we can only be human together."

Desmond Tutu
Handout 15: Tips for Professionals

- Memorize agency policies and follow them (dress code, what to do if you’re sick).
- If you are not sure, don’t be afraid to ask.
- Notice how respected people in your workplace dress and act, then follow their lead.
- Keep personal business at home—limit phone calls, texts, internet surfing.
- If you can’t do something, learn to say no nicely.
- Know your job description and make sure you do everything—not just those things you like doing.
- Sexual harassment can be physical contact, but can also include emailing or texting sexual pictures, or even making jokes or comments. Think twice before you make any joke or comment.
- Be careful about making personal relationships on a project. It can be difficult to focus on your work and it might lead to favoritism.
- Respect the personal space of coworkers. Ask to use their desk, supplies, etc. first.
- Being professional does not mean giving orders or being bossy. It means working together with others and earning their respect.
- Sometimes you might know how to respond professionally—talk to a coworker, mentor, or respected professional about the issue.
Handout 16: Practicing Professionalism

Here are some stories about Gary, a lived experience research leader. Read and discuss these in your group.

For each one discuss:

1) What might other people on the project think about Gary’s behavior?
2) What could Gary have done/ do differently?

S1: At the end of the meeting, there is a list of things that still need to be done. Gary says, “since you all were distracted and off topic the whole meeting, we’ve still got so much to do! I want you all to get together tomorrow and finish this work.”

S2: Gary is working with a researcher, Nikki, who is 15 years younger than him. Gary gets annoyed because he finds Nikki is bossy and he feels like a secretary. He always has to make coffee, set up the meeting room, and make copies. He doesn’t say anything to her, but starts to feel like he shouldn’t even bother with the project anymore if he’s not even going to be respected.

S3: One of Gary’s team members, Ricky, is a dental hygienist. Gary really needs some dental work done and has family members who need it too. Gary asks if Ricky can hook him up with a free cleaning and filling for his cavity.

S4: Right before the meeting, Gary’s friend sends him a picture on his phone and he starts laughing. Other team members hear him laughing and ask what it is. The picture has some nudity and crude humor but Gary decides to share it because they still have a minute before the meeting starts.

S5: One of Gary’s team members, Denise, asks him if he wants to get lunch after a meeting. Gary has been attracted to Denise for a while and is happy to go. He tells the other team leads that he will call them to discuss the project later and goes to lunch.

“Do the best until you can do better. Then when you know better, do better.”

Maya Angelou
Handout 17: Self-Care

Self-care is how you can take care of yourself so that you can do your best job on the project and feel good about yourself. Look at the six parts of wellness in this figure. For each part, think of self-care activities that you already do and list them below. Then in the right column, list self-care activities that you want to do in the future.

**How will taking care of yourself help the projects that you are working on?**

<table>
<thead>
<tr>
<th>Activities I do</th>
<th>Activities I want to do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emotions</td>
<td></td>
</tr>
<tr>
<td>Body</td>
<td></td>
</tr>
<tr>
<td>Mind</td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td></td>
</tr>
<tr>
<td>Work</td>
<td></td>
</tr>
<tr>
<td>Spirit</td>
<td></td>
</tr>
</tbody>
</table>
Tips for managing stress

- If something makes you anxious, do it right away or write it down.
- Say no if you need to.
- Take a break.
- Stay organized.
- Ask for help from your mentor.
- Talk about it with a counselor, therapist, friend, or family member.
- Keep a healthy lifestyle by getting exercise, sleep, and healthy foods.

What else can I do to manage stress?
Mentoring is a “collaborative learning relationship” between the mentor (experienced leader) and mentee (leader in training). The mentor and mentee work together to help the mentee reach a goal (complete a research project). The mentor-mentee relationship can be helpful for both people.

Am I ready to have a mentor?
Discuss the following questions as a group:

- Am I ready to develop as leader?
- Am I able to both listen and share my ideas with my mentor?
- Can I accept feedback from my mentor and try new things?
- Do I have expectations for mentor?

What does a mentee do?

- Decide how much support they need
- Decide what skills you want to develop
- Get knowledge from mentor
- Put what you have learned into practice

What do I expect from my mentor?

Your mentor will not be able to do everything, but if you think about what you expect from the mentor, you can ask for what you need at the beginning of the relationship. List below what you would expect a mentor to do: ______________________________________________________

How can I be a good mentee?

- Commit the time for meetings, homework, and growth
- Be flexible and open-minded to mentor feedback.
- Keep your mind on the big goals
- Remember that mentors can’t solve every problem
Handout 19: Solving Problems
(Source: asq.org/learn)

Think of problem-solving as a growth opportunity. Use the following steps to solve problems.

Define the Problem
- State the problem clearly
- List the causes of the problem.
- Check which of the above are facts and which are opinions.
- Write down if there is a violation of a standard, policy, or expectation.
- Is there a need to gather any more information to understand the problem?

Brainstorm Solutions
- Ask everyone involved to suggest solutions
- Make sure you have both short and long-term solutions
- Build off other people’s ideas

Review Solutions
- Write down the possible results of each solution
- Review solutions without bias
- Choose one solution and write it down

Use the Chosen Solution
- If possible, test the chosen solution in a small way

See How Your Solution Worked
- Get feedback from everyone involved
- Get everyone (even the ones who disagreed) on the same page to move forward
- Review the long-term results of the solution
Handout 20: Your Turn to Solve a Problem

Define the Problem

Brainstorm Solutions

Review Solutions

Use the Chosen Solution

See How Your Solution Worked
Handout 21: Conflict Management

The Thomas-Kilmann Conflict Management Approach is one way to think about managing conflicts. This approach describes two parts to conflicts:

(1) assertiveness: how much you make your own concerns known to others
(2) cooperativeness: how much you try to satisfy the other person’s concerns.

Different levels of assertiveness and cooperativeness create five main ways of reacting to conflict.

1. **Competing** is very assertive but uncooperative—an individual pursues his own concerns at the other person's expense. The person who is competing uses power (money, rank, ability to argue,) to stand up for their point of view, or simply to try to win.

2. **Accommodating** is unassertive and very cooperative—the opposite of competing. When accommodating, the person focuses on the concerns of the others rather than their own. This could mean self-sacrifice, which could be trying to help others, but could also
be following someone else’s orders when you really don’t want to.

3. **Avoiding** is unassertive and uncooperative—the person does not deal with the conflict or address any concerns. Avoidance could be mean that you just side-step (talk around the issue) or delay addressing the conflict until another time. Avoidance could get you out of a threatening situation.

4. **Collaborating** is both highly assertive and cooperative—the opposite of avoiding. People work together to find a solution that addresses everyone’s concerns. This means understanding the needs and wants of the two individuals. This can mean exploring a disagreement to learn from each other or trying to find a creative solution to a problem.

5. **Compromising** is moderate in both assertiveness and cooperativeness. The goal is to agree on a practical solution that partly satisfies both people. Compromising gives up more than competing but less than accommodating, falling in between. Likewise, it addresses an issue more directly than avoiding, but not as deeply as collaborating. This can mean often mean finding a middle ground.