Quick Reference Handout 9.5: Training and Supporting PC/PB Officers as Leaders

The officers of a Planning Council/Planning Body (PC/PB) are its leaders. They play a key role in ensuring the PC/PB fulfills its legislatively-defined responsibilities; making PC/PB and committee meetings productive; maintaining a diverse and inclusive planning body; and helping the PC/PB meet its charge of developing and maintaining a comprehensive, high-quality system of care that provides appropriate services for all people living with HIV (PLWH) who depend on the Ryan White HIV/AIDS Program (RWHAP) for their care. It is very important that officers receive the information, training, and support needed to fulfill their roles.

Who are the PC/PB Officers?

- **A Chair or Co-Chairs, and/or Vice-Chairs**—Most often a PC/PB has a Chair and Vice-Chair or two Co-Chairs. With the increase in integrated prevention-care planning bodies, sometimes the PC/PB has at least one additional Co-Chair, often the Prevention recipient. Often the PC/PB requires that one of these officers be a consumer of RWHAP Part A services or a PLWH. Some PC/PBs have a senior and a junior Co-Chair, which provides some succession planning. Sometimes the Chair is appointed by the Chief Elected Official (CEO); other officers are usually elected by the membership.
- **Committee Chairs, Co-Chairs, and/or Vice-Chairs**—Increasingly, committees are sharing leadership, both to share the workload and provide for succession planning. Bylaws specify whether committee officers are elected by members of the committee or appointed by the PC/PB Chair or Co-Chairs. One of the committee leaders is sometimes expected to be a consumer or PLWH. Some committees that include non-PC/PB members allow one of the officers to be a non-PC/PB member. Typically, the Chair or senior Co-Chair represents the committee on the PC/PB Executive Committee—a role that generally requires PC/PB membership and the vetting associated with it.

Some PC/PBs *elect* a parliamentarian from among the members, to help ensure that PC/PB meetings follow parliamentary procedure and meet requirements stated in the Bylaws and policies and procedures. When PC/PBs *hire* a parliamentarian, this individual plays an important role but is not considered a PC/PB officer. A few PC/PBs elect a Secretary to help with minutes and communication with PC/PB members, but usually PC/PB support staff play this role. In some PC/PBs, The Executive Committee includes 1-2 at-large members, often consumers, who are elected and are sometimes considered officers. Members elected to represent the PC/PB on statewide care and prevention planning bodies are sometimes considered officers.

Some PC/PBs have temporary work groups or temporary or ongoing caucuses that also have leaders. While these leaders are not usually members of the Executive Committee, they play an important leadership role in managing meetings and tasks. Sometimes they later become committee or PC/PB officers. Everyone benefits by including them in officer orientation, training, and support activities, especially those that may affect or inform their work.

Differentiating Chair, Co-Chair, and Vice-Chair Roles

- **Chair**—the leader of the PC/PB or committee. When the PC/PB has a single Chair, that individual typically chairs both PC/PB and Executive Committee meetings and serves as spokesperson for the PC/PB externally. A Committee Chair chairs all committee meetings, takes the lead on agenda development, and represents the committee on the Executive Committee.
- **Vice-Chair**—the number two leader of the PC/PB or committee, who fills in for the Chair when needed and carries out assignments from the Chair. If the Chair leaves unexpectedly, the Vice-Chair usually becomes Chair or at least Acting/Interim Chair. If the Chair is elected by the members rather than appointed by the CEO, the Vice-Chair is usually elected with the expectation of becoming the next Chair. Sometimes this is automatic; the Vice-Chair becomes Chair, and a new Vice-Chair is elected.
- **Co-Chairs**—two or more individuals who share leadership of the PC/PB or a committee. Sometimes both or all Co-Chairs have equal status. Other times one is more senior due to tenure or they are elected as the "senor" and "junior" Co-Chair. Sometimes one Co-Chair is required to be a consumer or PLWH or only one is allowed to represent a provider.

HRSA/HAB Expectations for Officers

The legislation and HRSA/HAB guidance provides a few expectations and sound practices for officers. For example, the *Part A Manual* says that:

- The Chair may be appointed by the CEO or elected by the PC/PB [p 103]
- The PC/PB may not be chaired solely by an employee of the recipient – this is a legislative requirement [p 148]
- Chairs/Co-Chairs must reside within the boundaries of the EMA/TGA [p 120]
- Chairs/Co-Chairs benefit from development of skills for facilitation and how to chair a successful meeting [p 244]
- The Chair/Co-Chairs sign the letter of assurance (PC) or concurrence (PB) included in the annual Part A application [p 51 and 2019 NOFO]
- At meetings, the Chair can help ensure that everyone is heard, the agreed-upon process for running meetings is followed, and time limits are placed on discussion [p 206]
- The Chair is expected to review and certify the accuracy of the detailed minutes of each PC/PB meeting [p 95]
- The Chair helps to review and manage conflict of interest [p 151]

Officer Support

Officers serve as volunteers, and their positions often require a major time commitment. While provider representatives may receive some support from their agencies including release time for meetings and officer duties, many PC/PB members do not have this kind of assistance. PC/PB support funds can pay for materials needed by an officer and for transportation expenses if the officer is an unaligned consumer. Beyond that, officers often depend on PC/PB support staff for support and advice. Most likely to need such help are:

- Recently elected officers
- Individuals who were PC/PB members for only a short time before their election and have not gone through an entire annual planning cycle
- Members with limited prior community planning experience, including many PLWH including consumers, and other members not representing service providers
- Members who did not receive thorough orientation or committee-specific training when they joined the PC/PB
- Members of PC/PBs that do not have an annual training plan or frequent mini-training opportunities related to membership

PC/PB support staff play a particularly important role in building trust with officers, offering assistance while respecting the officer's role and status, and making sure that needed information and administrative/logistical support are provided.

Important Officer Characteristics, Knowledge, and Skills

PC/PB officers are most successful when they bring or develop knowledge or expertise in the many different areas important to the work of an HIV planning body. Some personal characteristics also contribute to success, among them a strong commitment to the PC/PB mission and the purposes of RWHAP, a belief in the value of community planning, and a commitment to inclusive planning. Much of the needed knowledge comes with experience as a PC/PB member and as an active committee member. However, officers are especially effective when they gain additional knowledge and access to updated information, and when they have skills for leading the planning process—both "content" skills in HIV community planning and "process" skills related to how groups develop and interact. Knowledge and skills that contribute to officer effectiveness include the following:

KNOWLEDGE OF:

- **RWHAP:** Familiarity with RWHAP legislation, guidance, and history—especially Part A, including legislatively specified roles for the recipient and PC/PB and the annual planning cycle
- **The EMA/TGA and its Part A program:** The local epidemic, the recipient agency's structure and staffing, current integrated/comprehensive plan and progress toward its goals, system of HIV care, current service priorities and funding allocations, expenditures as reported to the PC/PB, HIV care continuum (linkage to care, retention in care, viral suppression), PLWH service needs, barriers, and gaps
- **The PC/PB's governance and operations:** Bylaws, polices & procedures, committees and work groups, PC/PB officer positions and responsibilities, PC/PB support staffing including position descriptions, contents of the Memorandum of Understanding between recipient and PC/PB (if one exists)

- **The PC/PB's membership:** Current membership roster including vacancies by member category, representation and reflectiveness, open nominations process and any current recruitment challenges, and the process used and typical timeline for sending nominations to the CEO or designee (often Boards and Commissions) for vetting and appointments
- **The PC/PB's status and work plan:** The PC/PB's annual work plan, committee work plans, and their progress and challenges, and the current annual PC/PB budget and expenditure reports from the recipient or PC/PB support contractor

SKILLS RELATED TO:

- **HIV community planning:** Organizing and implementing key planning tasks, especially legislative roles of the PC/PB
- **Communications:** Especially oral communication skills, as needed to run meetings, speak on behalf of the PC/PB, and communicate effectively with other members, PC/PB support staff, recipient staff, and outside organizations
- **Meeting rules/procedures:** Using and enforcing the PC/PB's chosen method of running meetings, whether *Robert's Rules of Order* or some other model
- **Recipient relations:** Working productively with recipient staff
- **Leadership/group process:** Understanding of group process and skills needed to:
  - *Chair and facilitate meetings that are well planned and productive*
  - *Work well with members from diverse cultures and backgrounds*
  - *Motivate, engage, and support all members*
  - *Manage public comment and input, in formal meetings and community settings*
  - *Support group development to establish and maintain a high-performing team*
  - *Analyze and resolve conflicts and other group-process issues*
  - *Implement truly inclusive planning*

Officer Orientation and Training

All PC/PB officers need some orientation and training. Even veteran members with extensive planning experience need to be kept up-to-date about changing RWHAP guidance and expectations and given new tools for dealing with group process issues. As suggested above, PC/PB officers need knowledge about many different topics and skills in handling varied situations. Some officers have much of this knowledge from serving on the PC/PB and from prior experience. Others must learn as they go. The Officer Development Menu on the next page identifies specific knowledge and skills, suggests which topics are likely to be needed by which types of officers, and identifies possible strategies and resources for enhancing officer capacities.

Strategies for PC/PB Officer Orientation, Training, and Support

PC/PBs can and should use a wide range of strategies and methods to orient, train, and support officers. Following are a set of strategies that can be used together to help ensure that officers have needed knowledge and skills and have continuing opportunities to enhance their capacity:

1. **Orientation:** Provide a structured, interactive orientation for new officers immediately after their election, and before they are expected to chair their first meeting.

2. **Self-assessments:** Ask all new officers to self-assess their knowledge and skills and identify most-needed orientation, training, and materials.

3. **Officer Development Plan:** Prepare a concise but specific Officer Development Plan for the PC/PB each year that includes shared and individual officer needs and provides strategies and a timeline for planned officer development opportunities. It might include:
   - **Orientation—**topics to be covered, participants, learning method/strategy, timeline, and person(s) responsible for planning and implementation
   - **Training sessions,** stand-alone, at Executive Committee meetings, other—topics to be covered, participants, learning method/strategy, timeline, and person(s) responsible for planning and implementation
   - **Individual development** for a particular officer—topics to be covered, learning method/strategy, timeline, and person responsible for providing the opportunity
   - **Other learning opportunities—**for all officers, particular categories of officers, and individuals, with topics, strategies, and target dates.

   A suggested chart format for an *Officer Development Plan* is provided at the end of this handout.

4. **Budgeting of funds for officer development where possible:** Set aside some PC/PB support funds for officer training and support. With or without a budget, make maximum use of volunteer trainers to share their expertise—current and former PC/PB members, PC/PB support staff, recipient staff, other Health Department personnel, and provider staff and Board members.

5. **Access to materials:** Be sure all officers have quick access to needed documents—make copies readily available so they don't need to find and print them, but also let them know where these documents can be found online. They will need a wide range of materials such as the PC/PB's Bylaws, the *Planning Council Primer*, or the most recent version of important HRSA guidance such as Policy Clarification Notices (PCN). For officers who have easy access to computers, put key documents into some form of shared folder. For those who do not, prepare a binder with core documents and then provide copies of additional materials as they are received, developed, or used in training.

6. **Use of Executive Committee meetings:** Set aside time during Executive Committee meetings for quick, focused training sessions and information updates.

7. **Periodic training sessions:** Hold periodic training or consultation sessions for officers as a group or for all committee officers, to learn new tools, share experience, and address identified information or skill development needs. This can be done before or after Executive Committee, full PC/PB, or other meeting, to minimize costs.

8. **Mentoring:** Arrange for former PC/PB officers to serve as mentors or advisors to new officers, formally or informally; where appropriate, PC/PB support staff may also play this role, particularly for committee officers—but generally not for the Chair, since the Chair typically plays a role in directing the work of the PC/PB support manager.

9. **Continuing support from PC/PB support staff:** Ensure access to needed information and materials, logistical and administrative assistance, and advice for meeting planning and follow up and for successful completion of other tasks; the PC/PB support manager is likely to work most closely with the PC/PB Chair or Co-Chairs, while PC/PBs with multiple support staff are likely to share responsibility for work with committees and their leaders

10. **Other officer development opportunities:** Think creatively in arranging other opportunities for officer development; for example:
    - Attendance at meetings or conferences that include training, with the individual then sharing new skills and tools with other officers
    - Observation of other planning bodies that provide useful models—by attending personally if they are nearby or through electronic means if they are not
    - Use of debriefings, including member feedback, to learn from experience
    - Use of online training, such as group-process or team-building sessions
    - Access to materials and tools addressing leadership and group-process topics

PC/PB Officer Development Menu

Use the chart on page 7 to help identify topic areas where officers need information and/or skills. Individual officers can use the chart as a basis for self-assessing their needs, and individuals responsible for officer orientation and training can use it to identify priority topics for their sessions. Experienced members who become officers often have a great deal of the needed knowledge, though sometimes the orientation and training they received was limited or not recent. They will need information and training to fill those gaps, access to new data and materials, and updates on new HRSA/HAB guidance. In terms of skills, group process skills are often a priority for all officers, especially those who have not previously chaired or managed meetings. All can benefit from new ideas for fully involving consumers and ensuring an inclusive planning process. Everyone benefits form opportunities for learning, problem-solving, and consultation with other officers. Veteran members and officers can be valuable mentors and advisors to less experienced officers, while benefiting from new ideas and recommendations for change.

PC/PB Officer Development Menu

Knowledge/Skill Area: **RWHAP**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Legislation • Program history • HRSA/HAB guidance, including Fact Sheets, *Part A Manual,* Information in Annual Notices of Funding Opportunity (NOFOs, and Policy Clarification Notices (PCNs), plus initiatives like Ending the HIV Epidemic	• All need basics • Veteran officers most often need information from recent NOFOs and PCNs and about new initiatives	• Provide & discuss materials • Use scenarios	• Copies of legislation, fact sheets, NOFO information, key PCNs • *RWHAP Part A Manual* • *Planning Council Primer* • Training Guide, Module 1 • Training Guide, Module 2 • Training Guide, Module 3 including Annual Planning Cycle Chart

Knowledge/Skill Area: **YOUR EMA/TGA AND ITS PART A PROGRAM**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Local epidemic—latest epidemiologic profile, trends, estimated number and characteristics of PLWH who are out of care (unmet need), estimated number of PLWH who are unaware of their status, HIV Care Continuum (for all PLWH and for RWHAP clients)	• All need basics and current data • Some officers, especially if newly elected, may need training on epidemiological terms and concepts like unmet need and on understanding data	• Provide copies of epi profile and other data • Provide interactive training on understanding and using data where needed • Ask the local epidemiologist to brief officers on important trends in the epidemic, unmet need, and PLWH unaware of their status	• Latest EMA/TGA and state joint epidemiologic profile [usually done annually based on a CDC guidance] • Training Guide, Module 10, especially material on Data Types and Sources
• Recipient ageny Part A structure and staffing	• All need at least a quick update	• Ask the recipient to meet with officers to discuss structure and staffing	• HIV unit or RWHAP Part A organizational chart and description (often included in Part A application)

Knowledge/Skill Area: **YOUR EMA/TGA AND ITS PART A PROGRAM (continued)**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• System of care • Current service priorities and resource allocations (Part A and Part A MAI) • Other RWHAP funding in the EMA/TGA • Other funding for HIV prevention and care in the EMA/TGA	• All need to understand the system of care • Need for officer training depends on how much discussion occurs each year in the PC/PB, usually as part of PSRA • Committee officers of related committees may need more detail	• Hold a roundtable with diverse providers and recipient • Map the system of care with officers or the whole PC/PB • Ask the committee responsible for care strategies to brief officers	• Materials describing the system of care, especially information from the integrated plan, latest Part A application, most recent PSRA documents, service standards • Training Guide, Module 2: Key Factors in PC/PB Community Planning, Establishing and Maintaining a Comprehensive System of HIV Care • Training Guide, Module 7, especially Concept of a System of Care and How the PC/PB Helps Improve the System of Care
• PLWH-related data: needs assessment data on PLWH service needs, barriers, and gaps; information on RWHAP client characteristics; Part A cost and service utilization data; other aggregate data such as performance measures, quality management and monitoring findings	• All need a basic understanding of current data • New members and officers of relevant committees may need more detail	• Provide a data briefing to officers that addresses data content, quality, completeness, and gaps at an Executive Committee meeting • Use the Data Presentation before PSRA as a basis for discussion among officers of data highlights and gaps • Provide individual or small-group training on needs assessment to committee officers of relevant committees	• Needs assessment reports and PowerPoints as presented to the relevant committee and used in Data Presentation • Summary from most recent Part A application • Training Guide, Module 4, especially Understanding Needs Assessment

Knowledge/Skill Area: **PC/PB GOVERNANCE/ OPERATIONS**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Bylaws, polices & procedures, committees and work groups, meeting rules and process • Roles and responsibilities of officers • PC/PB support staffing including position descriptions; scope of work if the PC/PB support function is contracted	• All need copies and familiarity with both Bylaws and PC/PB policies and procedures, including officer position descriptions • PC officers need more knowledge about PC/PB support	• Ask each officer to take responsibility for reviewing one governance document and highlighting content to other officers • Ask a veteran or former officer and the PC/PB support manager to lead a briefing and discussion on staff roles, support available for officers, and challenges, and HRSA/HAB expectations for staff	• Copies of your PC/PB's governance and operations documents • *Part A Manual*, Section X—Planning Council Operations • Training Guide, Module 8, Structure and Staffing • Training Guide, Module 9: Handout 9.3 Roles and Tasks for PC/PB Leaders and Staff • Compendium of Materials for PC/PB Support Staff, Section on PC Support: Structure, Staffing, and Responsibilities
• Contents of the MOU between the PC/PB and recipient (if your PC/PB has an MOU)	• All need to have a copy of the MOU • PC/PB officers need to know content and any areas of concern or conflict	• Review the MOU in an Executive Committee meeting, and ask both the recipient and a PC/PB veteran officer or former officer to describe how it works, its value, and any areas of concern	• Compendium of Materials for PC/PB Support Staff, Section on Relationships, Sample MOU between the PC and the Recipient • Training Guide, Module 8: Relationship with the Recipient

Knowledge/Skill Area: **PC/PB MEMBERSHIP**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Roster, vacancies, representation and reflectiveness including required chart • Open nominations process and current challenges in recruitment • Process your PC/PB uses to send nominations to the CEO or designee (such as Boards and Commissions) and typical timelines and challenges • Committees that allow non-PC/PB members to serve and how those members are recruited and vetted	• All should have copies of roster and representation and reflectiveness chart • PC/PB officers and committee officers of the Membership Committee need more detail	• Have a current or former Membership Chair/Co-Chair summarize and lead discussion on membership processes and any current issues or challenges • Schedule a separate briefing/ training for Membership officers with retiring officers and/or PC/ PB support staff	• Your PC/PB's current membership roster and most recent Representation and Reflectiveness Chart • Written information if available on the vetting and appointment process used by the CEO or Boards • Your PC/PB's written Open Nominations Process • Training Guide, Module 8 section on Membership and Handout 8.2 on Recruiting a Representative and Reflective PC/PB

Knowledge/Skill Area: **HIV COMMUNITY PLANNING**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Organizing and implementing key planning tasks, especially legislative roles of the PC/PB: needs assessment, integrated/ comprehensive planning, PSRA (priority setting, resource allocation, directives, reallocation), and AAM	• PC/PB officers should have familiarity with all legislatively-required and Bylaw-specified tasks • Committee officers should have detailed understanding of the responsibilities of their own committees	• Provide copies of PC/PB orientation materials, PC/PB roles & responsibilities chart, and Training Guide handouts • Train committee officers from committees responsible for key legislative tasks • Provide individual sessions with any committee officers who have limited committee experience or were on the PC/PB for less than a full annual planning cycle before becoming officers • Arrange mentoring by previous PC/PB and committee officers	• Your PC/PB's Bylaws and all policies and procedures related to planning tasks • Training Guide modules on PC/PB tasks: Modules 4-7

Knowledge/Skill Area: **PC/PB STATUS AND PLANS**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• PC/PB's annual work plan, committee work plans, and their progress and challenges • Current Integrated Prevention and Care Plan and progress data	• All should be familiar with annual work plan and integrated plan • PC/PB officers need to understand committee work plans and status • Committee officers need greatest familiarity with the work plans of their own committees and committees with which they work closely	• Review the annual calendar and work plan at an Executive Committee meeting and discuss how it links to the integrated plan • Have committee officers review current committee work plans and report to the Executive Committee about identified issues or concerns	• Your PC/PB's annual calendar, annual work plan, and committee work plans • Your Integrated Prevention and Care Plan, especially the work plan, and data on progress towards plan goals • Training Guide, Module 6 • Planning Council Primer, Appendix II, Sample Planning Council/RWHAP Part A Program Calendar
• Current annual PC/PB budget and recent expenditure reports on use of these funds	• All should know PC/PB budget amount • PC/PB officers should review budget and expenditure reports • Committee officers should know funding available for key committee tasks (e.g., needs assessment)	• Provide a PC/PB budget and expenditures overview at an Executive Committee meeting, including funds available for key committee tasks in the coming year • Provide an individual briefing/ training on budget issues for senior PC/PB officers	• Your PC/PB's current annual budget and expenditure reports • Training Guide, Module 8: Other PC/PB Policies and Procedures, PowerPoint slides on PC/PB Support Budget

Knowledge/Skill Area: **COMMUNICATIONS**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Oral communications—speaking, running meetings, representing the PC/PB with outside groups	• All need communications skills for chairing meetings and benefit from developing other skills • PC/PB officers need speaking and representational skills	• Provide training on running a meeting by a former Chair or other expert on the PC/PB • Role play various types of oral communications—chairing a contentious meeting, speaking on behalf of the PC/PB at a community meeting or recruitment event • Ask experienced officers or former officers to mentor new officers	• Training Guide, Module 9: PC/PB Operations, Successful PC/PB Meetings, including Handout 9.1 on Effective Meetings: Tips for PC/PB and Committee Chairs/Co-Chairs • Materials available online, including those identified in Training Guide, Module 9 Trainer Notes, For More Information/Skills for Officers
• Written communications—preparing agendas and short documents like emails, letters, concise reports for a committee or the PC/PB	• All need to be able to prepare an agenda or concise email and benefit from other writing skills • PC/PB officers may need more in-depth training	• Make available materials on preparing an agenda and developing effective emails • Provide a mini-training if there is need and interest	• Materials available online, including those identified in Training Guide, Module 9 Trainer Notes, For More Information/Skills for Officers

Knowledge/Skill Area: **MEETING RULES/ PROCEDURES**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Using the PC/PB's method or model for running meetings, whether Robert's Rules of Order, a simplified version of parliamentary procedure, consensus, or some other approach—following and enforcing these rules and procedures	• All who chair PC/PB or committee meetings and are expected to follow approved process	• Discuss with all officers the rules that Bylaws require for PC/PB meetings and for committee meetings, clarifying any differences or flexibility • Provide and discuss summaries or "cheat sheets" • Provide a quick training session on parliamentary procedure or your PC/PB's alternative rules, by someone expert who serves on the PC/PB or an external expert	• Summary materials on use of the approved procedure, including "cheat sheets" that summarize key processes • Training Guide, Module 9, Procedures for Running Meetings in PowerPoint, and materials identified in Trainer Notes, For More Information/Parliamentary Procedures and Alternatives to *Robert's Rules of Order*

Knowledge/Skill Area: **RECIPIENT RELATIONS**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Working productively with recipient staff	• Necessary for PC/PB officers • Committee officers also benefit from such skills	• Provide Sound Practices document to all officers • Discuss expectations and protocols with all officers • Provide and discuss scenarios on the PC/PB —recipient relationship from resource materials • Be sure senior PC/PB officers (Chair/Co-Chairs, Vic-Chair) are kept informed about any issues related to the relationship or the MOU and understand their role in maintaining a productive relationship	• Training Guide, Module 8—Structure and Staffing, Relationship with the Recipient, Relationship with the Recipient, Quick Activity D and Handout 8.1, Working Successfully with the Recipient: Tips for PC/PBs • Sound Practices for Addressing Some Important Aspects of the Relationship between the RWHAP Part A Recipient, and Planning Council and PC/PB, PC Support Staff, and Recipient Roles: Scenarios

Knowledge/Skill Area: **LEADERSHIP AND GROUP PROCESS**

TOPICS	OFFICERS NEEDING THIS TOPIC	SUGGESTED STRATEGIES	RESOURCES
• Planning, chairing, and facilitating meetings • Managing public comment and input, in formal meetings and community settings	• Quick review/update for all officers • Interactive training for officers new to chairing meetings	• Provide reference materials on chairing meetings • Provide interactive training including role plays to new officers	• Training Guide, Module 9, materials on Working Effectively in Committees and Successful PC/PB and Committee Meetings including reference materials on Leadership and Group Process listed at the end of the Trainer Notes, and Handout 9.1—Effective Meetings: Tips for PC/PB and Committee Chairs/ Co-Chairs
• Supporting group development including use of Tuckman model to establish and maintain a high-performing team • Analyzing and resolving conflicts and other group-process issues, using the Code of Conduct, other policies and procedures, and techniques for managing conflict	• All officers, with more in-depth training for officers who have not received prior training in use of the Tuckman model or other group-process analyses	• Provide reference materials on the Tuckman Model • Arrange group-process training for officers • Have officers plan and implement Clearfield Pigeon Project activity with the PC/PB at a retreat or training session • Have more experienced officers train and mentor new officers	• Training Guide, Module 9, Working Together, materials on the PC/PB as a High-Performing Team, including the Clearfield Pigeon Problem Role Play Activity and Handout 9.2—Using the Tuckman Model of Group Development
• Working with members from diverse cultures and backgrounds • Motivating, engaging, and supporting all members • Implementing inclusive planning in all types of meetings	• All need basic understanding of group-process and leadership roles in managing groups • Those chairing meetings need to be able to apply group-process skills in chairing or facilitating meetings • PC/PB officers need the most extensive skills because of group size.	• Provide Inclusive HIV Community Planning Handout • Have a discussion on how to make planning more inclusive as part of an Executive Committee meeting or at an officers' retreat • Adopt some specific actions for officers to test, then report back to the Executive Committee	• Training Guide, Module 9, Working Together, materials and Inclusive Planning—including Handout 9.5—Ten Strategies for Inclusive HIV Community Planning • Training Guide, Module 2—Roles and Responsibilities, materials on Maximizing Consumer Participation Opportunities

Officer Development Plan Template

For each topic listed, put a checkmark to indicate which officers should be trained on it.

Type of Opportunity and Topics	All Officers	PC/PB Officers	Committee Officers	Individuals (Names)	Strategies/ Methods	Timeline/ Responsibility
Orientation Session(s)						
[List topics, with separate lines for separate sessions]						
Training Sessions						
[List topics, with separate lines for separate sessions]						
Individual Development	N/A	N/A	N/A			
[List topics, with separate lines for separate sessions]	N/A	N/A	N/A			
Other Opportunities						
[List topics, with separate lines for separate sessions]						