Trainer Manual
for Community Advisory Boards

Module 7
CAB Recruitment and Retention
MODULE 7: CAB RECRUITMENT AND RETENTION

Proposed Agenda

Opening Activity: Motivation Exercise (30 minutes)

Slides and Discussion (45 minutes)

Activity: CAB Member Job Description (45 minutes)

Closing Activity: Retention Plan (45 minutes)

Participant Evaluation (15 minutes)
**OPENING ACTIVITY**

**Module 7**

**MOTIVATION EXERCISE**

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**Time frame** *(30 minutes)*

**Purpose**

During this exercise, participants will identify things that they feel are motivational, and identify ways that these motivational factors could be incorporated into the work of the CAB.

**Materials needed**

- Chalkboard with chalk and eraser or flipchart with marker *(optional)*
- Small prizes *(optional)*

**Instructions**

- Give participants a personal example of something that motivated you to accomplish a task. *For example:* I am motivated to read to my child every night because I know it is good for his intellectual development and because we both enjoy it very much. In this case, the motivating factors are intellectual growth (for my child) and my sense of satisfaction and enjoyment.

- Ask participants to personal stories, thoughts and ideas about motivation. Make a list of motivating factors for everyone to see. *(To make this exercise fun, it would be nice to motivate participants to work at this exercise by giving a small prize to those who share their ideas with the group. A simple round of applause is a good substitute.)*

- Using this list, ask participants for their ideas about how some of these factors might be incorporated in the CAB in order to motivate members to participate fully and to remain active with the CAB. *For example:* If recognition is a motivating factor, then discuss possible techniques for bringing recognition for good work to the CAB and to individual members.

- After identifying ways that motivating factors might be incorporated in the CAB, then complete the exercise by devising an “action plan”. The action plan should detail what tasks need to be accomplished to incorporate the motivational techniques, and should identify the person or persons responsible for each task. *For example*—Task 1: CAB member ____________ will ask the principal investigator to support the CAB by providing regular monthly training sessions to be led by various members of the research or clinical teams. This will help to motivate the CAB because members like to know they are gaining knowledge and skills through their participation in the CAB.

- End the exercise by thanking participants for sharing their ideas and experiences.
Module 7

Slides – Insert Here
Module 7
Recruitment and Retention of CAB Members
Trainer Manual
This teaching tool was developed by the François-Xavier Bagnoud Center at the University of Medicine and Dentistry of New Jersey, with the support of the International Maternal Pediatric and Adolescent Clinical Trials (IMPAACT) network.

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Slide 3

Objectives

After completing this training, participants will be able to:

- Talk about ways to recruit (find) CAB members.
- Discuss ways to keep CAB members active.
- Describe how to develop leadership skills in CAB members.
- Talk about how to make sure resources and ongoing support are available for the CAB and its members.
- Design strategies for getting support of research team while working towards partnership.
- Define CAB success.

This slide lists the objectives (goals) for the [first half of this] module.

After completing this training, we hope participants will be able to:

1. Talk about ways to find (recruit) CAB members who come from the population(s) who will participate in the research.
2. Discuss ways to keep CAB members interested and active.
3. Describe how to help CAB members develop the skills they need to fulfill the responsibilities of CAB members.
4. Talk about how to make sure resources and ongoing support are available for the CAB and its members.
5. Design strategies for getting support of research team.
Recruiting CAB Members

- Clarify the CAB mission and objectives.
- Define what is expected of members.
- Explain what each recruit will add to the group.

There are several things you can do before recruiting new members to help recruitment go smoothly:

- The first and most important is to make sure you are able to discuss the mission and objectives of the CAB so the people you are recruiting understand what you do.

- Write a job description and use it when recruiting CAB members. By reading it and talking with you, the recruits will come to understand what is expected of members and how they will be supported in their work.

- Explain that CAB members participate in meetings, give time and effort to working on protocol and informed consent review and educating community members about the research.

- You should also be able to explain the knowledge and skills you are looking for in a CAB member so people can understand why they are being asked to join.
Recruiting CAB Members

- Discuss the rewards of CAB membership.
- Explain IMPAACT community representation.
- Explain how the CAB will be supported.
- Clarify the CAB’s relationship with the research team.

- Describe the rewards of CAB membership, including gaining new knowledge and skills and the chance to provide service to your community.

- You also should be able to explain what kinds of support the CAB will receive and what the CABs relationship is with the research team.

- Reassure potential new members that they will receive training to address their learning needs.
Who are CAB members?

- HIV-affected or infected teenagers, women
- Caregivers of HIV-infected children
- HIV clinic staff members
- Representatives of HIV service organizations
- Community leaders
- Former or current study participants

Every CAB makes its own decisions about who will become a member. IMPAACT CABs include members who are from the populations being studied in IMPAACT research: HIV-affected or infected teenagers and adults, caregivers of HIV-infected children, HIV clinic staff members, representatives of HIV family service organizations, community leaders, and former or current study participants.

People in the community who care for and work with people infected with HIV and their families have a “built-in” commitment to improving their lives. They will have different skills, and different levels of knowledge about HIV, but they will share that common goal.
First, make a list of the populations that need to be represented on the CAB.

Then identify the knowledge and skills they will need to have to be valuable CAB members.

Example: having a caregiver on the CAB will bring the point of view of someone who takes the patient to the clinic. This person can comment on whether the number of clinic visits in a protocol would be a burden and on the complexity of an ARV regimen.

If it is difficult to find new members with the knowledge and skills you would like to have on the CAB, consider if training is a realistic alternative.

Also, consider selecting for recruiters CAB members who know people in a range of community groups and are comfortable explaining the purpose of the CAB and the work of the members.
Sometimes CABs may have difficulty including members from vulnerable or stigmatized populations. Maybe members of that population are against joining the CAB or are not able to participate (e.g. speak a different language). Or maybe it’s CAB members’ attitudes that are the problem.

Like all of us, CAB members may have difficulties accepting certain groups who are infected or at risk for HIV.

A CAB member is affected by the same cultural norms as any other member of the community. If the cultural norm at one site is to shun injection drug users, will this stigmatization be reflected in the CAB membership?
Recruiting CAB Members: Diversity

Is it ethical to include stigmatized populations in the research, yet not have representatives of the stigmatized group on the CAB?

**Trainer:** Discuss these points (but change the stigmatized group to one the participants at your site are familiar with):

- Will a mother on the CAB with heterosexually transmitted HIV infection be able to accept as a new member an injection drug using mother with an infected child?

- How will sex workers be represented on the CAB (if this population is a part of the HIV-affected community at your site)?

- Does the CAB discuss stigmatization?

- Should stigmatization of all people infected or at risk for HIV should be actively discouraged? Is it ethical to include these populations in the research, yet not include them as community representatives on the CAB?
Another task: discuss where to find potential CAB members. Because each community is different, these places will not be the same for all CABs.

Each of you is an expert on why someone might want to join a CAB. Talk about your reasons for joining the CAB, and about unexpected rewards you’re experiencing as a CAB member.

On the slide is a list of places where you might begin to look for new CAB members.

**Trainer:** If time allows, you may wish to discuss other places where potential CAB members might be found.
“Retaining” CAB members means keeping members active and energetic, eager to continue serving on the CAB. Retaining CAB members takes time and effort.

CAB members are giving up their time to serve. So they need to feel their work is appreciated and supported, that their time is being used well. You don’t want members feeling the CAB is chaotic or unproductive.

One way to support CAB members and help the work of the CAB go smoothly is to create rules and guidelines. This helps avoid disorganization, frustration, or a sense that decisions are unfair. For example, will a CAB member who rarely attends meetings be allowed to continue serving? How do you decide who will lead the CAB?

Another way is to set goals for every meeting and to have an agenda and follow it. That is the leaders’ responsibility. As leaders become more experienced, they will become better at setting realistic goals and planning agendas.

Sticking to the agenda doesn’t mean you can never have controversy or never talk about something that is not on the agenda. It just means making every effort to have a goal and a plan for each meeting, and meeting that goal by keeping organized.
Developing specific, realistic, and measurable goals will make it possible for CAB members to see the achievements of the CAB and feel they are making progress.

At each meeting, remind each other what goals have been met, for example:
- We recruited 3 new members.
- We reviewed 3 informed consent forms and gave feedback to the research team.
- We wrote rules about meeting attendance.

Getting administrative support for the work of the CAB is extremely important. Examples of administrative support:
- Arranging a meeting place
- Arranging access to a computer with Internet and e-mail capabilities and creating an e-mail account for the CAB
- Notifying members of meetings, sending an agenda in advance
- Reimbursing CAB members for transportation, child care, meals
- Copying and distributing educational materials to CAB members
- Assistance with arranging education and training sessions for the CAB
- Taking notes at each meeting and producing them for the CAB (sometimes a CAB member does this, but support may be needed)
CAB members are more likely to continue actively working with the CAB:

- When each CAB member understands his/her responsibilities roles are clear, preventing confusion and stress.

- When the CAB works closely with the research team to identify CAB members' training needs so that CAB leaders can plan educational programs. Providing training lets members know their work is valuable and gives members a sense of personal growth. Encourage members to develop new skills by attending these programs.

- When a CAB member acquires new skills, CAB leaders need to tell the member that these new skills will benefit the CAB as a whole. Then the person will know the CAB leaders appreciate the effort to learn new skills, and that they view the person as a more valuable member of the CAB.
Another way to keep CAB members involved is to develop a partnership with the research team. Then CAB members will feel they are valued and respected. To achieve this, CAB and research team members need to communicate regularly about expectations, needs, and achievements.

Meetings also give CAB members the opportunity to share feedback from the community. It is also important for CAB members to report any problems they are having with their work and to ask for information or help.

Meeting with the research team is also an opportunity for the research team to keep CAB members informed about all IMPAACT activities locally and about plans of the network. The team should report regularly to the CAB about enrollment, retention of participants, plans for future research, safety issues, or changes to a protocol.
Retaining CAB members

- Share information from regional, international CAB colleagues.
- Provide feedback from local CAB members to regional, international colleagues.

Helping CAB members recognize they are part of the larger research effort is another way to keep them involved. You can do this by sharing with them the successes and challenges of regional and international CAB members, and of IMPAACT network leaders.

This communication should be two-way; it is very important for local CABs to communicate what is happening in their community to international CAB members. The ICAB needs information on what community members are saying about the research. That's because ICAB members communicate directly with IMPAACT leadership, and can influence decisions about research when they have important information from local communities.
Retaining CAB members

- Confidentiality
  - Discuss privacy and personal information.

- Comfort
  - Members need to feel they are welcome and included in the group.

- You need to set rules about confidentiality (privacy). When CAB members are HIV-infected, or have children or other family members with HIV, they may not feel comfortable having this information known outside of the CAB.

- All CAB members must feel certain everyone in the group will keep personal information private. It’s likely that some personal issues will be discussed in CAB meetings. And it’s important that all CAB members know that what they discuss in the group stays in the group.

- Another issue is ensuring CAB members feel comfortable, welcome, and included. This is especially true for a CAB member who is part of a highly stigmatized group, but is true for all CAB members.

- New members in particular may not understand all of the discussions and the ongoing work, and can feel left out. If members continue to feel uncomfortable or excluded, they are not going to want to continue serving on the CAB.
Retaining CAB members

- Costs: money and time
- Emotions: stress and burnout
- Special needs: extra attention

One of the biggest barriers to joining a CAB is cost. Many who want to become CAB members can’t afford to go to meetings if they have to pay for travel and/or childcare. It is highly desirable to include money for travel or childcare or meals in the CAB budget.

Being a CAB member is time consuming and can be stressful, especially for members who already face poverty or ill health. To prevent CAB members from feeling overwhelmed, make sure the work plan is realistic and work is distributed fairly. Making time for socializing or fun activities may also be helpful.

Some members are likely to have special needs: poor health, limited language or reading skills, active substance abuse, being the only representative of a population—the only adolescent on the CAB or the only member with HIV infection. CAB leadership and other members should recognize members’ special needs and do their best to meet them.

When CAB members seem to need more support for their personal HIV-related issues, try to refer them to a support group. Perhaps the CAB can influence the team to start a support group if none exists! Though you do not want to cut off all discussions of personal issues during CAB meetings, it is best if the CAB does not confuse its role with that of a support group in a way that interferes with the role of the CAB in the research program.
There may be times when CAB leaders will ask a member to resign (leave the CAB). Each CAB needs to make a policy to deal with this situation before it occurs. The policy should describe the behaviors that require resignation or dismissal.

Examples of reasons for dismissal:

- Disclosing private information (about CAB members or study participants)
- Missing too many meetings
- Attending meetings while using alcohol or other drugs
- Harassing CAB members or study participants

Usually, the policy describes how to decide if a CAB member should be asked to leave and the steps to take after making the decision. For example, the policy may say that the member will get one or two warnings before the CAB votes on dismissal. And it may state that a majority of the members must agree that dismissal is necessary. (Or the CAB may decide that breaking confidentiality will lead to immediate dismissal.)
Recognizing leadership skills and developing new leaders is another way to retain CAB members. This type of personal growth keeps members committed to the group.

Provide the proper training or arrange for mentorship. CAB leaders can serve as mentors and make opportunities for others to practice leadership skills. Learning by experience is one of the most effective learning methods.

Another way to train new leaders is to give them the chance to work with colleagues in the regional and international networks. This opens a whole new possibility for growth and helps the member feel part of a larger effort.
This next 3 slides ask questions that will help you find out if your CAB is reaching its first goals. Part I applies to a relatively new CAB, which might simply want to have a specific number of meetings and members who attend regularly and represent the target populations. Seeing if members choose to remain on the CAB will also be a key piece of information.
Measuring CAB success

Part II

- Has the CAB developed a mission, objectives, and policies?
- Has the CAB made progress toward meeting the objectives?
- Have the CAB and the research team agreed on their expectations of each other? Have they met those expectations?
- Has the CAB made progress toward addressing members’ education and training needs?

The questions in Part II reflect CAB growth from a brand new organization to one that has larger goals. These questions indicate that the CAB has a stable membership and a regular meeting schedule, and that it is moving forward toward more complex issues:

- Has the CAB developed a mission, objectives, and policies?
- Has the CAB made progress toward meeting objectives?
- Have the CAB and the research team agreed on their expectations of each other? Have they met those expectations?
- Has the CAB made progress toward addressing the members’ education and training needs?
The final slide looks at measuring CAB success. It reflects the hope that as the CAB matures, there will be meaningful communication at the regional and international levels and measurable progress toward partnership with the research team.

- Has there been communication between the CAB and regional and/or international community representatives?
- Has there been progress developing new leadership skills among the CAB members?
- Have any CAB members assumed leadership roles who had not previously been leaders?
Slide 23

Summary

- Recruit CAB members from populations who will be studied in IMPAACT research.
- Retain members by having realistic goals, providing education and training.
- Work towards a partnership with the research team and foster leadership.
- Success will vary between sites depending on the experience of CAB members and the length of time since the CAB was formed.
**Activity**

**Module 7**

**CAB Member Job Description Exercise**

**Time Frame** *(30 minutes)*

**Purpose**
During this exercise, participants will discuss how to describe the job of being a CAB member. An accurate description of the work expected of members will be helpful in recruiting new members who are truly interested in the work, and will help the CAB to identify skills that would be helpful to the work of the CAB. A job description can also motivate CAB members, as it gives them a useful tool to describe their work to others.

**Materials Needed**
- Chalkboard with chalk and eraser or flipchart with marker *(optional)*
- Sample job description (for participants and the trainer)
- Blank job description document (for participants)
- Module 1 materials *(optional)*

**Instructions**
- Review the sample job description provided in this module with participants. This will help participants form ideas about writing a job description for CAB members.

- Divide participants into small groups or pairs. Instruct the groups to discuss and list the roles and responsibilities of a CAB member *(Module 1 is helpful in this regard)*. Reassure participants that their contributions are valued and that there is no wrong answer.

- After 15 minutes, ask the groups to stop their discussion in order to share their ideas with the larger group. Facilitate discussion of the ideas so that there is feedback and consensus on the job description. List the agreed-upon responses. These responses become the basis for the development of an official CAB job description.

- Identify a person (CAB member or member of the research team) who can take the list and use it to format a job description that is similar to the one provided as a sample.

- Tell participants that once the job description is completed and reproduced, it will be distributed to all members. CAB members can use the description in telling others about their work (which can be motivating) and can use it as a recruiting tool when needed.

- Thank participants for their work.
ACTIVITY

Module 7
RETENTION PLAN EXERCISE

Time frame *(45 minutes)*

Purpose
- This exercise will help participants to identify ways to keep participants in the CAB interested, motivated, and willing to work on CAB goals.

Materials needed
- Chalkboard with chalk and eraser or flipchart with marker *(optional)*

Instructions
- For this exercise, the trainer may elect to divide participants into small groups for discussion, or to facilitate a broad discussion with the entire group. Generally, it is desirable to break into smaller groups if there are more than about 25 participants in the training.

- Ask participants to spend 10-15 minutes reviewing the slides and their notes related to retention of CAB members. Instruct them to think about what retention techniques could be realistically implemented at their site, and to think about the specifics of how the techniques could be implemented.
## PARTICIPANT EVALUATION FORM

### Module 7

**CAB Recruitment and Retention**

### INSTRUCTIONS:
- Your opinion is important to us.
- There are no RIGHT or WRONG answers.
- Your answers are private. You do not need to put your name on this form.
- Please answer ALL the questions to help us improve this training.
- For questions 1–5, please rate the effect the training has had on your understanding of the following:

<table>
<thead>
<tr>
<th>0= No effect, 1= Some effect, 2= Much effect</th>
<th>No Effect</th>
<th>Some Effect</th>
<th>Much Effect</th>
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<tbody>
<tr>
<td>1. Finding CAB members</td>
<td>0</td>
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<tr>
<td>2. Keeping CAB members interested and active in the CAB</td>
<td>0</td>
<td>1</td>
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<td>3. Developing leadership within the CAB</td>
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<td>4. Getting support of research team while working towards partnership</td>
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<td>5. Determining if CAB is successful</td>
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**For the last 2 questions, 0= not useful, 1= useful, 2= very useful**

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<tr>
<th>0= not useful, 1= useful, 2= very useful</th>
<th>No Effect</th>
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<tr>
<td>The materials in the training manual</td>
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<td>This training as a whole</td>
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*Please continue on the next page.*
Please answer the following questions to the best of your ability:

After this training, what help might you need to apply this information?
__________________________________________________________________________
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What part of this training did you find the most useful?
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What changes would you suggest to make the training more useful?
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What other training programs do you feel are important for CAB member?
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Other comments:
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Thank you for your comments!
**TRAINERS’ ASSESSMENT: POST-TRAINING**

**Module 7**

**CAB Recruitment and Retention**

*Please help us evaluate the training for this module by telling us about the level of improvement you observed in the participants’ knowledge of CAB recruitment and retention.*

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<th>MAJOR IMPROVEMENT</th>
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<tbody>
<tr>
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<td>2. Keeping CAB members interested and active</td>
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<td>3. Developing leadership among CAB members</td>
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<td>4. Strategies for getting the support of the research team while working towards a partnership</td>
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<td>5. Defining CAB success</td>
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**Please answer the following questions.**

What changes would you suggest to make the training more useful?

____________________________________________________________________________
____________________________________________________________________________
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What part of this training did you find the **most useful**?

____________________________________________________________________________
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**Trainer Name:** | **Signature:** | **Date:**

Please use the back of this form for additional comments and suggestions.