

# INSPIRING CHANGE LEADERSHIP TRAINING

A curriculum for preparing African American lived experience  
research leaders.



**Instructor Manual**

## AUTHORS

The following members of the Leadership Advisory Board created this curriculum.

Lindsay Sheehan

Sonya Ballentine

Sylvia Cole

Christopher Ervin

Jamie Eskridge

Cheryl Metcalf

Scott Noble

John Owens

Helen Wakefield



This project was funded by Patient Centered Outcomes Research Institute (PCORI) award IIT-3974.

**FOR MORE INFORMATION GO TO:** [www.chicagohealthdisparities.org](http://www.chicagohealthdisparities.org) or contact Lindsay Sheehan at [lsheehan@iit.edu](mailto:lsheehan@iit.edu)

Citation: Sheehan, L., Ballentine, S., Cole, S., Ervin, C., Eskridge, J., Metcalf, C., Noble, S., Owens, J., & Wakefield, H. (2017). Inspiring Change Leadership Training Manual: A leadership curriculum African Americans with serious mental illness in community-based participatory research. Chicago, Illinois: Illinois Institute of Technology.

## ABOUT THE AUTHORS

**Lindsay Sheehan** is Senior Research Associate at Illinois Institute of Technology. She helped develop the Inspiring Change Community Based Participatory Research (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.

**Sylvia Cole** is a Territory Supervisor for Hallmark Cards. She has associate's degrees in both medical assisting and computer science. Sylvia has bipolar disorder and sarcoidosis, an autoimmune illness.

**Christopher Ervin** is a native of South Carolina who brings lived experience and leadership experience to the table. Christopher's goal in life is to use his holistic history to encourage a better holistic future for himself and others. Holistic, Healthy, and Happy.

**Jamie Eskridge** is a lived experience leader who was born and raised in Chicago. She was introduced to CBPR through a focus group on addiction stigma for African Americans. Since being part of the team, she has learned not only about research, but also about herself and how to help the community.

**Cheryl Metcalf** is a lived experience research leader. Since being on the team, she has learned how she can use her story to her own benefit and advocate for others to make positive changes.

**Scott Noble** is an outreach worker and health educator who is now working on his second CBPR project. Scott has been involved with CBPR projects for the past three years.

**John Owens** has a Master's degree in Early Childhood Education and worked as a childcare provider for several years. He was homeless for three years and now participates on several local consumer advisory councils.

**Helen E. Wakefield** is an advocate for children, communities, and families targeting young ladies and women's issues. Her driven purpose is to inspire others to success. Quote: "Live Ladies Live"



## PREFACE

This training is designed as a 2-day (total: 12 hour) seminar. Trainers should recruit trainees with lived experience of serious mental illness. Potential participants should have the following characteristics:

- Ability to participate in group training activities
  - With reasonable accommodations provided as needed
- Interest in leading a project (not necessarily experience)
- Openness to learning
- Basic communication, reading, and writing skills
- Commitment to attending the sessions

Before the Session:

Participants should be provided with the training agenda and asked about possible accommodation needs (based on a disability). Trainers can conduct phone screenings with potential participants to assess their needs and readiness for the training.

Trainers/facilitators should complete all the handouts prior to facilitation so they can give examples and understand the experience of participants.

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

**Important Note to Trainers:** This training should be facilitated or co-facilitated by people with lived experience of mental illness, and who have personal experience with leadership in research settings. This curriculum provided a framework for the training; however, trainers should incorporate their personal style and give examples from their own lives during each session. Before facilitating, trainers should review each session and make notes on which personal

examples they will share. Examples that demonstrate personal growth, recovery, and resilience in the face of vulnerability usually engage the audience most.

Facilitators should take the temperature of participants understanding throughout the training, and leave time to provide individual support.

Additional resources for facilitators are provided in the appendix.

**Pre-Assessment:** Trainees should complete the pre-assessment questions before beginning the training (Time: 10 mins)

# Contents

Opening.....	7
Session 1: Introduction to CBPR .....	9
Session 2: What is Leadership? .....	12
Session 3: Communication Skills .....	14
Session 4: Project Management .....	16
Session 5: Leading a Meeting .....	18
Session 6: Professionalism and Self-Care.....	19
Session 7: Mentorship.....	21
Session 8: Solving Problems and Managing Conflicts .....	22

# Opening

## Housekeeping

Make announcements about breaks, restroom locations, the agenda, etc.

## Accommodations

Explain that you want to provide accommodations for people who have physical or mental conditions that might come up in the training

Define accommodations: Accommodations are adjustments or changes that we make to the training to allow everyone to participate fully.

Give examples of accommodations:

- seating someone with limited vision or hearing at the front of the room
- allowing breaks to take medication
- repeating instructions
- providing an alternate lunch option for someone with food allergy

Tell participants that if anyone has questions and wants to discuss accommodations privately, they can do so before the session starts, or during the breaks.

## Introductions

- Welcome trainees and introduce yourselves. Spend 5-10 minutes highlighting your lived experience of both mental illness and developing leadership skills
- Ask trainees to briefly introduce themselves. Depending on the size of the group and time considerations, ask participants to state their name, affiliations, what they hope to gain through the training, and a fun fact about themselves.

## Purpose

Explain the purpose of the training:

1. 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.

Examples of unfair barriers include:

- a. Not being trusted or believed (because of racial prejudice or mental illness stigma)
- b. Not having access to educational, health, or financial opportunities (because of racial/disability discrimination)

- c. Not having access to the grant/funding resources and not being represented in positions of power that make decisions about funding.
  - d. **Note:** Consider giving an example from your own life here.
2. We believe that professional researchers need to partner with lived experience people to do their best research
  3. 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**

Write or display your suggested expectations on the board or screen. Ask participants to identify if anything is missing or if there is anything they would like to change. Suggested expectations are as follows:

- 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

### **Final Note**

Thank everyone for being willing to learn and participate today. Explain that everyone can use the leadership skills that we will be learning in their lives (jobs, volunteer work, in church, with family, etc.) as well as in 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.

- Note: What examples can you give participants from your own experiences?

---

---

### **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.
- **Note:** What examples can you give participants from your own experiences?

---

---

**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.

Note: What examples can you give participants from your own experiences?

---

---

**End session by asking for questions and feedback.**

## Session 2: Transformational 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.
  - Note: What examples can you give participants from your own experiences?

---

---

- 

### 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.

Ask the group if they can give an example of a person who uses each style.

- Note: What examples can you give participants from your own experiences?

---

---

Ask the group to think 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.

- Note: What examples can you give participants from your own experiences?

---

---

- 
- Ask trainees: What does it mean to be a project leader? What would you do?



**End session by asking for questions and feedback.**

## Session 3: Communication Skills

### Communication Skills Introduction (5 min.)

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.
- 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.) Have one person be the listener (lived experience leader), one person be the speaker (CBPR leader) and one person the timekeeper/observer. Hand out cards with roles and scenarios for participants to role play. Ask speaker, listener, and time keeper to fill out form on Handout 7 and give feedback to the listener.
  - Next present and role-play the “Following Skills.” Get back into small groups for practice. (20 min)

10 min break

- 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)

**End session by asking for questions and 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** (15 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** (20 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.

**End session by asking for questions and feedback.**

# 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 (30 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.
  - Note: What examples can you give participants from your own experiences?

---

---

- 
- Facilitator roles plays with team to model coming up with group rules.

## Basic Meeting Rules/ Comforts (30 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.

**End session by asking for questions and feedback.**

## Session 6: 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 first and ongoing impression on community partners, other leaders, and to help the rest of your team develop.
  - Your research partners and participants will trust you more if you behave professionally.
    - Note: What examples can you give participants from your own experiences?
- 
- 

•

### **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 and ask trainees to take notes.
- Ask trainees to share the issues they most want to work on improving.

### **Tips for Professionals** (10 min)

- Read the first tip on Handout 15: Tips for Professionals. Then ask for participation from trainees.
  - Provide witty examples for tips that relate to your lived experiences.
- Ask them to use the Handout 15: Tips for Professionals to help them think about these issues in the future.
- Tell trainees they can use mentors to help them build professionalism over time.

### **Practicing Professionalism** (30 min)

- Introduce Handout 16: Practicing Professionalism.
  - Present the two questions to be addressed.
- As a group, read the stories about Gary aloud and discuss the two questions.

### **Self-Care** (30 min)

- Introduce Handout 17: Self-Care.

- Define Self-Care
- Read the National Wellness Institute six parts of wellness aloud.
  - Note: What examples can you give participants from your own experiences?

---

---

- 
- 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.
- Transition to tips for managing stress.
- Ask trainees to share with the group what types of stress they have experienced.
- Complete activity by asking trainees to write down what they can do to manage stress.

**End session by asking for questions and feedback.**

## Session 7: Mentorship

### **Introduction (10 min)**

- Start with showing video clip about mentoring
- Explain the definition of mentoring from Handout 18: Mentorship.
- Ask the group to think about the questions under “Who mentored you in the past?” and asks for volunteers to share their experiences. Discuss how mentors might help you move forward in your leadership development.

### **Mentor and Mentee Roles (35 min)**

- Ask group to imagine themselves as research leader and check the boxes for what they would want in a mentor.
  - Note: What examples can you give participants from your own experiences?

---

---
- 
- Read the “How can I be a good mentee?” section and give examples.
  - Ask group if they have other examples to add.
- Read the section “How can I find a mentor?”
  - Ask group if they can think of any other ways to find a mentor.
- Ask participants to brainstorm who might be a mentor to them and how they might find that person. Have them write this on the line provided.

**End session by asking for questions and feedback.**

## Session 8: Solving Problems and Managing Conflicts

### Introduction to Problem-Solving (15 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.
  - Note: What examples can you give participants from your own experiences?

---

---

- 

### 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:** Team members are not showing up for the group.

**Problem 3:** Team members disagree on how to do the project. Some members want to administer the surveys themselves on paper and some think the participants should complete the surveys online.

**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)

Introduce yourself and your research experience.

Read the introduction on Handout 21: Conflict Management

Help trainees distinguish between assertiveness and aggression.

### **Ways of Managing Conflict (30 min)**

- Read each of the descriptions on 5 ways of handling conflict
- 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 all of these at different times.
- Ask trainees to take some time and look at the figure on Handout 21.
- Take time to explain the figure again for those that may have difficulty understanding.

Go through each term and present real-life pros and cons of each.

#### Examples

- 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?”
- 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.
- 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 (30 min)**

- Put trainees into small groups.
- Give them examples of conflicts and discuss what ways they would use to manage these conflicts.
  - Conflict 1: George, the academic researcher, will never answer your 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.
  - Conflict 2: One of the team members is being insulting to another team member, by making underhanded comments in group.

- Conflict 3: Everyone else in the group can meet on Thursdays, but one member can never come because she has to work.
  - 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.
  - Conflict 5: Ask the trainees to think of other conflicts they might need to resolve.
- Come back to the group and discuss

**End session by asking for questions and feedback.**



## Appendix

### Facilitator Resources

“Moving Beyond Icebreakers, An Innovative Approach to Group Facilitation, Learning, and Action...” by Stanley Pollack with Mary Fusoni