COMMUNITY ADVISORY BOARD
BEST PRACTICES & RECOMMENDATIONS 2024

CONSUMERS COMMITTEE
HIV HEALTH & HUMAN SERVICES PLANNING COUNCIL OF NEW YORK

INTRODUCTION: THE VALUE OF CLIENT ADVISORY BOARDS (CABs)

- CABs improve the **quality of services** at Ryan White-funded agencies in order to meet the needs of people with HIV (PWH).
- CABs provide **critical perspectives from PWH lived experiences** as consumers of Ryan White services, informing program evaluation & provider policies.
- CABs make clients **true stakeholders** in RWPA programs.
- CABs **build PWH leadership and empowerment** of PWH.

CONTEXT FOR CABs

- CABs **benefit** consumers and providers. Agencies should not be deterred because of concerns that a CAB will cause conflict. Disagreements can be dealt with respectfully and lead to positive change.

- If implemented well, CABs provide a unique avenue for **quality improvement**.

- Use these Consumer-developed **Best Practices Guidelines** to implement an effective CAB.

OVERARCHING GUIDELINES

- CABs should have formal **bylaws** to institutionalize policies and procedures; bylaws are living documents and should be revised as needed.

- CABs and staff need to be **accountable** to themselves and each other to ensure that CABs are effective and productive.

OVERARCHING GUIDELINES

- **Financial support** from the agency is needed, with resources dedicated to supporting CAB participation.
- **In-person** meetings are preferable, as they allow for more dynamic participation. Ensure they are accessible to all.
- CAB meetings are **safe spaces**. Members should be able to speak/voice concerns without fear of retaliation.

BEST PRACTICES: CAB COORDINATION (1)

- **Conduct an orientation** at the beginning of the cycle to assure that members have a shared understanding of their roles and responsibilities; policies and procedures for client concerns, grievance procedures and a clearly delineated process for client engagement, input, discussion and feedback. Create a fact sheet for new members with terms, definitions, etc.
- CABs should begin each cycle with **ice breaker and team building exercises**;
- CAB meetings should be **scheduled** on a **recurring basis** *(same day of week, time, location, etc.);* Additional meetings as needed when special topics come up;
- **Member lists, phone/text and email trees** should be used to keep members informed of meetings.

CAB COORDINATION (2)

- CABs should consider the use of a **buddy system for formalized mentoring** so that seasoned CAB members can guide and inform newer members;
- CABs should provide printed **meeting calendars**, a **timeline** of activities, and **Rules of Respectful Engagement** to govern participant behavior and communication;
- CABs should be **facilitated** by an identified chair(s) from among the client members, supported by a liaison who is the primary contact for the CAB

CAB COORDINATION: MEETING AGENDAS & MINUTES

- The CAB **meeting agendas** should be developed jointly by CAB staff, leadership and members to assure that all perspectives are included in discussions and presentations.
- **Agendas should be detailed,** identifying items to be discussed, as well as **timeframes** for discussions.
- The agenda should clearly state who the responsible parties are for presentations, actions and follow-up.
- Allow for **flexibility** to discuss issues not previously identified.

CAB COORDINATION: MEETING AGENDAS & MINUTES

- Meeting agendas should include a **public comment time period** or systems for written comments/input.

- CABs should ensure that **1) meeting minutes** record highlights of relevant discussions and action items, and **2) parking lot issues/report backs** to the CAB are part of the next meeting's agenda.

CAB COORDINATION (4)

- CAB leadership should **encourage those individuals** who tend not to actively participate to contribute their thoughts and/or opinions.
- **Publicize CAB meetings** among clients, including fliers at service sites and through email/text/MyChart to include clients who receive virtual services.
- **Attendance** requirements should be determined by the CAB.

CAB & TEAM LEADERSHIP (1)

- CAB leadership should have **strong leadership skills** and assist in establishing a **culture of engagement and respect** that allows individuals to state their opinions and where group participation is the norm and expectation.
- CAB leadership should have **strong facilitation and active listening skills** that foster communication and validate member input. CAB chairs should seek input and viewpoints *(verbal or written)* from all, **allowing everyone a chance to express their thoughts.**
- CAB leadership should **not prioritize personal agendas** and not dominate the conversation but **encourage those who are hesitant** to participate.

CAB & TEAM LEADERSHIP (2)

- The CAB should assure that members have a **shared understanding of their roles and responsibilities** with a designated meeting facilitator. CAB leadership should identify CAB members who agree to take **lead roles in addressing follow-up actions** *(as agreed to by the CAB).*

CAB CONFLICT MANAGEMENT & RESOLUTION (1)

- CABs should use **Robert's Rules of Order** to assure that meetings are run in an orderly manner with an emphasis on giving **all members an opportunity to voice their opinions and/or viewpoints.**
- Establish **formal conflict/dispute resolution guidelines and procedures** to resolve issues and/or disagreements among members. Members should **commit to following procedures** in order to arrive at resolutions; members who can not commit to following procedures may be barred from participation on the CAB.
- Encourage **individual member participation and discussion** when dealing with conflicts/issues affecting the CAB's work, mission and goals.
- Everyone has a **right to respectfully state their opinion/point of view.**

CAB CONFLICT MANAGEMENT & RESOLUTION (2)

- **Identify problem(s) and/or issue(s) and develop realistic outcomes and/or goals,** while following guidelines for discussion as established by the CAB.
- When an issue or conflict arises that affects the CAB's functioning, the CAB leader(s) should become actively involved in the **facilitation of the conflict resolution process** with members, in order to prevent disrupted meetings.

TEAM EFFECTIVENESS (1)

- CAB membership should be **inclusive of diverse expertise and experiences** and include a cross section of agency/program clients; membership should reflect the demographics, cultural and life experience of the program's clients; CABs should be welcoming to clients from under-represented groups.
- While the **CAB's mission, goals and policies** should be focused on meeting client needs, CAB members should understand the **role of the CAB** in prioritizing and meeting needs, as well as understanding when that is not possible.
- CABs should ensure that there is a mechanism in place or agency CAB staff person on board to **advocate in support of clients' needs.**
- **Personal agendas are secondary** to issues which may have a material impact on the services the agency's clients are receiving.

TEAM EFFECTIVENESS (2)

- **Client input and feedback policies** should be developed to efficiently and expeditiously address specific client needs.
- CABs should establish methods and/or tools to reach agency consumers/clients *(other than CAB members)* to get **broad perspectives.**
- CABs should also develop an **awareness of client needs** through client feedback, surveys and other means and develop a method to **prioritize expressed needs** and to **follow up** and propose **solutions** to address/resolve client needs. Written records that respect **client confidentiality** should be maintained.

TEAM COMMUNICATION

- CAB leadership should establish/develop a **climate of trust and safety**, where **confidentiality is assured and enforced.**
- CAB leadership should demonstrate **appropriate behavior, set the tone for the meeting** and be **proactive** in diffusing negative comments and **preventing escalation** of a conflict or an issue.
- CAB leadership should **create opportunities for CAB members to express themselves** *(verbally or in writing)* and to contribute their feedback, thoughts or concerns.

ONGOING CAB SUPPORT

To ensure the ongoing support of an effective CAB:

- **Provide ongoing technical assistance;**
- **Collaboration** between CAB and agency on any recommendations for quality improvement;
- **Accountability**: maintain a check list of tasks with responsible parties and timelines;
- **Recognize member contributions.** Give CABs credit/recognition for their input/work; and
- **Facilitate communications** with CAB members from other agencies to share experiences and build learning opportunities.

MORE CAB RESOURCES

- Find the above CAB Best Practices Guidelines at: https://nyhiv.org/community-advisory-board-best-practices-recommendations/
- “Getting Started: A Consumer Advisory Board Manual for Title IV Programs” - https://nyhiv.org/community-advisory-board-getting-started/
- “Getting it Right: A Self Assessment Tool for Consumer Advisory Boards” - https://nyhiv.org/consumer-advisory-board-manual-getting-it-right/