



GUIDE FOR ORGANIZATION OF VIRTUAL MEETINGS ON RESOURCES

POSITIONAL CLARIFICATION



June 2026 Version

CONTACT INFORMATION

For more information on this document, please consult the Cross-Training website: www.formationcroisee.com

For any other questions, please contact Diana Milton:
diana.milton@douglas.mcgill.ca

Michel Perreault, PhD's Research Team:

Douglas Mental Health University Institute
Integrated University Health and Social Services of
the West Island of Montreal
6875, Blvd. Lasalle
Montreal (Quebec) H4H 1R3
Tel.: 514-761-6131
Email: michel.perreault@douglas.mcgill.ca

EDITION

Redaction

Léonie Archambault
Cathy Bazinet

Revision

Léonie Archambault
Michel Perreault

June 2026 Version

Graphic Design and Layout
Cathy Bazinet

CREDITS AND MENTIONS

This guide was produced thanks to the support of Health Canada, the Minister of Health and Social Services, the Douglas Mental Health Institute.

“The views expressed here don’t necessarily reflect those of Health Canada.”

“The views expressed here don’t necessarily reflect those of Minister of Health and Social Services.”

“The views expressed here don’t necessarily reflect those of the Integrated University Health and Social Services of the Center-South of the Island of Montreal.”

COPYRIGHT



CC BY-NC-SA: This license allows reusers to distribute, remix, adapt, and build upon the material in any medium or format for noncommercial purposes only, and only so long as attribution is given to the creator. If you remix, adapt, or build upon the material, you must license the modified material under identical terms.

TABLE OF CONTENTS

- 4 What is Cross-Training?
- 5 The Cross-Training Program on Mental Health and Substance Use Problems
- 6 Why Have Virtual Meetings on Resources?
- 7 Modalities
- 8-11 **Planning a Virtual Meeting**
Setting Up a Virtual Meeting
Hosting a Virtual Meeting
Conducting a Debrief on the Virtual Meeting
- 12 What Are the Key Moments in Organizing the Activity?
- 13 Evaluation of the Activity
- 15-17 Appendix 1 – Example of a Template for Structuring a Virtual Meeting
Appendix 2 – Example of Consent and Release Form
Appendix 3 – Example of Event Promotion



WHAT DOES THIS GUIDE ADDRESS?

This guide is a reference document in which the objective is to facilitate the task of teams who wish to put in place a Cross-Training activity. Three other guides regarding online training, virtual meetings on resources and observation internships are available on our website as well: formationcroisee.com

The content is based on the experience of the Montreal South-West Cross-Training project (Perreault et al., 2008). The online activities were developed in the context of the Covid-19 pandemic.

Perreault, M., Wiethaeper, D., Perreault, N., Bonin, J-P., Brown, T., & Brunaud, H. (2008). Meilleures pratiques et formation dans le contexte du continuum des services en santé mentale et en toxicomanie : le programme de formation croisée du sud-ouest de Montréal. Santé mentale au Québec, 34 (1), pp. 143-160.

WHAT IS CROSS-TRAINING?



At its origin, cross-training is an approach used to improve the work between team members, or among partners of different teams.

In summary

In general, there are three types of Cross-Training*

1

Positional Clarification

2

Positional Modelling

3

Positional Rotation

Common objectives: Better understand the role, expertise, and resources available to each partner. To this end, developing a common language is a prerequisite for supporting fruitful exchanges.

Sharing of Descriptive Expertise <<< >>> Better knowledge of the network and everyone's role

Better knowledge of the network and everyone's role

Activities

- Conferences
- Case Discussions
- Panels

Better knowledge of an organization (stakeholders and functioning)

Activities

- Short-term observational internships

Acquisition de compétences en intervention

Activities

- Medium- to long-term intervention internships
- Clinical supervisions

* Perreault, M, Milton, D, Alunni-Menichini, K, Archambault, L, Perreault, N, Bertrand, K. Montreal Cross-Training Program: The contribution of positional clarification activities to help bridge fragmented prevention and treatment services for co-occurring disorders. Health Soc Care Community. 2020; 28: 1090- 1098. <https://doi.org/10.1111/hsc.12942>

THE CROSS-TRAINING PROGRAM ON MENTAL HEALTH AND DEPENDENCE DISORDERS

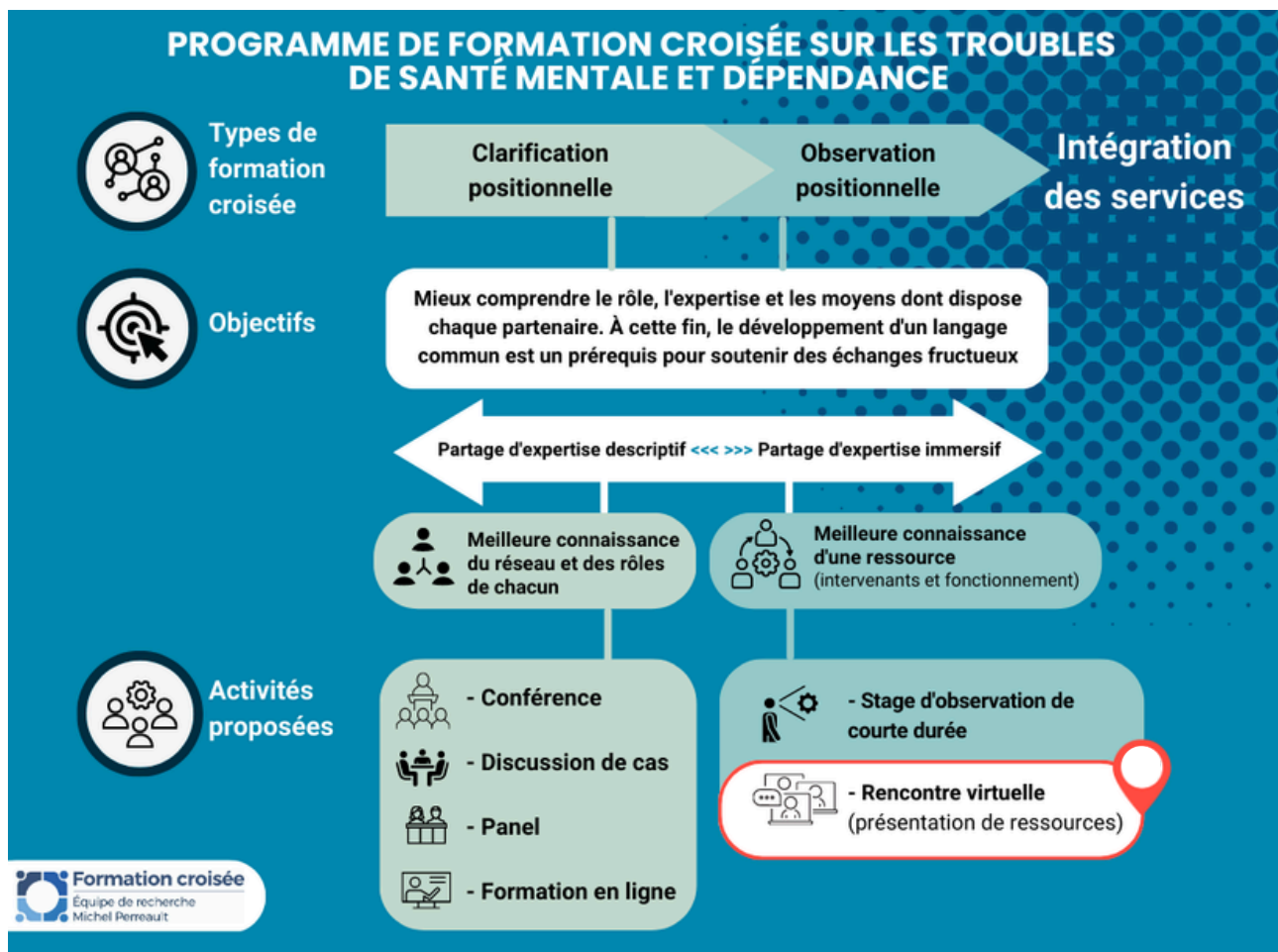


Initiated by mental health partners located in the south-west of Montreal in 2002, the **Cross-Training Program on Mental Health and Substance use Disorders** proposes training activities as well as interdisciplinary and intersectoral observational internships.

The main goal of these activities is to improve the continuity of care for people at risk or already struggling with both mental health and substance use problems. Seeing as these individuals must rely on services coming from different networks (e.g., mental health, substance use, education, prevention, aging, public safety, public security), cross-training aims to facilitate connections between them in order to ensure better continuity of care.

What are the objectives of the program?

- Identify the training needs of practitioners working with individuals at risk or living with mental health and substance use disorders.
- Enable practitioners to develop a common language and a better understanding of available resources and fellow professionals in order to collaborate effectively.



WHY HAVE VIRTUAL MEETINGS ON RESOURCES?



Context

Due to exceptional public health measures during the COVID-19 pandemic in 2020, in-person cross-training activities had to be modified to a virtual format.

In this context, in order to maintain the goal of improving the continuity of care for individuals at risk for, or struggling with both mental health and substance use disorders, activities on Virtual Meetings on Resources were developed for intervention workers.

As individuals requiring care often rely on services from distinct networks (mental health, substance use, school environment, prevention, aging, public safety), virtual meetings aim to present available resources or services and explain how they operate to the intervention workers who accompany service users (e.g., clientele served, referral processes, approaches used, etc).

These virtual resource meetings are now complementary to the program's original service offer, which has provided interdisciplinary and intersectoral training activities and observation internships since 2002.

Objectives:

- Develop a common language and a better comprehension of Who does what.
- Present resources from different sectors and points along the service continuum.
- Encourage participation by:
 - inviting participants to share their expectations and questions during registration;
 - inviting participants to suggest additional resources;
 - encouraging participant interaction via chat during the meeting.
- Evaluate the activity using service-integration indicators in order to attain the objectives.

MODALITIES



Lasting one hour, the virtual resource meetings are generally held during the lunch hour in order to facilitate and encourage the participation of as many individuals as possible at their workplaces.

They typically consist of three presentations of approximately 15 minutes each.

The meetings may be attended live, allowing for exchanges and questions. A recording can be made and subsequently made available online to allow for delayed viewing. This recording may also be used as training material within an organization, for example to support knowledge transfer to a team or to new intervention workers.

In addition, complementary tools may accompany the online posting of the recording, such as a list of resources related to the topic presented.

Legend :



The CROSS-TRAINING icon indicates that including this step in the activity enhances participants' experience and level of engagement.



The DOCUMENT icon indicates that examples are available in the guide's appendices.

1. PLANNING A VIRTUAL MEETING



1

Identify the topic and potential speakers



At this stage, we can mobilize different individuals in the reflection, such as team members or partners.

2

Recruit speakers and provide them with a presentation template



An example presentation template for speakers is available in the appendix.

3

Select a date and complete technical follow-ups (e.g., reserve a Zoom or Teams webinar license; ensure technical support if needed).

4

Identify team members who will be responsible for hosting the event, managing comments, recording, and accomplishing other tasks during the virtual meeting

5

Once speakers and the date are confirmed, send out an initial “Save the date” to inform the target audience of the upcoming event

6

Prepare the registration platform (e.g., Eventbrite)



Provide space for participants who wish to submit one or more questions related to the meeting’s topic.

2. SETTING UP A VIRTUAL MEETING



1

Ask speakers to provide PowerPoint presentations or visual materials such as organizational photos or any information that would help better illustrate the work carried out and the resources available. Assemble these materials into a master document that also includes discussion elements (introduction, question period, acknowledgements, evaluation).

2

Ask speakers to sign a consent and release form.



An example is available in the appendix. It may be useful to verify whether your organization already uses such a document, as it may contain more specific clauses.

3

Prepare a detailed program of the event.

4

Launch and promote the activity with program details and the registration link (send to mailing lists, post on social media, the intranet, etc.).



An example is available in the appendix. The announcement should include the organization's logo, indicate the topic, speakers, date, and registration modalities.

5

Prepare the online evaluation form



(an example is available in the appendix).



Prepare a list of complementary resources.

6

Send a [Who does what?](#) List of tasks to involved team members, including their contact information.



7

Send a reminder to registered participants a few days before the event.

3. HOSTING A VIRTUAL MEETING



1 Organizing team connects and technical checks are performed.

2 Speakers connect, tests are performed and instructions given

- The team ensures that all microphones and cameras are functioning properly.
- The host reminds speakers to unmute when speaking and mute afterward.
- The host informs speakers that a chime or visual cue will be given a few minutes before the end, to signal the end of their presentation.

3 Participant Reception

- A team member assists participants who experience connection issues (via email if needed).
- A team member begins the recording.
- The host welcomes participants, explains the meeting format, and introduces the speakers.

4 Speaker presentations

- Speakers present their respective resources in turn.
- The host ensures that the allotted presentation time is respected.
- Team members take note of pertinent questions asked in the Q&A.
- One team member tracks changes in participant attendance.

5 Question-and-answer period

- The host initiates the Q&A using questions submitted during registration or prepared in advance by the team.
- A team member adds relevant questions asked in the Q&A.
- A team member alerts the animator to important questions that may have been overlooked.

6 Evaluation and conclusion

- The host reminds participants to complete the evaluation form.
- A team member posts the evaluation link in the chat.
- The host presents acknowledgements and concludes the meeting.

4. CONDUCT A DEBRIEF OF THE VIRTUAL MEETING



1

Team meeting

- Following the virtual meeting, available team members discuss how the meeting unfolded, key observations, and potential improvements to the format.

2

Thank-you email sent to speakers



Processing and posting of the recording online

3

Reminder email to participants regarding completion of the evaluation form

4

Analysis of evaluation results.



Feedback is shared with team members and/or partners to go over evaluation findings.

WHAT ARE THE KEY MOMENTS IN ORGANIZING THE ACTIVITY?



BEFORE THE EVENT

15 weeks

- Consult partners to identify the topic
- Select the date

14 weeks

- Validate Zoom or Teams webinar license

13 weeks

- Recruit speakers

12 weeks

- Establish the program
- Send out the "Save the date"

10 weeks

- Launch promotion of the meeting and online registration

9 weeks

- Prepare the online evaluation form

2 weeks

- Prepare the "Who does what?" list
- Have the speakers sign the consent form

1 week

- Prepare the PowerPoint presentation for the meeting

1 day

- Send reminder to registered participants

APRÈS L'ÉVÉNEMENT

Following days/weeks

- Analyze evaluation results and produce a report

ACTIVITY EVALUATION



The evaluation of the success of a cross-training activity is reflected through several indicators, including the participation of the different partners involved in delivering the activity (in kind or financial) and the participation of intervention workers from partner organizations.

It is also important that the activity meets participants' expectations, and administering an evaluation form makes it possible to document their perceptions of the activity.

The results allow organizers to assess the relevance of offering similar activities again in the future as well as improving the organization of the activity based on participants' feedback.

An example of an evaluation form is provided on the following page.

EXAMPLE – EVALUATION FORM

1. What did you most appreciate during this virtual meeting?

2. What could be improved?

3. The activity...

...met my expectations

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

...was relevant to my practice

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

... allowed me to learn more about the
functioning of at least one new resource

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

... allowed me to identify intervention
workers I could consult in my practice

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

...allowed me to obtain useful information to
guide the individuals I work with

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

4. I work with individuals experiencing problems in:

Mental Health

Substance Use

Both

Other

5. Je travaille dans le milieu suivant :

Community resource

Readaptation Center

Youth Center

CLSC

Public Safety

Hospital

School Environment

Other

6. In which geographic region do you work in?

CIUSSS de l'Ouest-de-l'Île-de-Montréal

du Centre Ouest-de-l'Île-de-Montréal

Nord-de-l'Île-de-Montréal

du Centre-Sud-de-l'Île-de-Montréal

du Nord-de-l'Île-de-Montréal

de l'Est-de-l'Île-de-Montréal

Autre

7. Which themes would you wish to cover in the next virtual meeting?

APPENDIX 1 – EXAMPLE OF A TEMPLATE FOR STRUCTURING A VIRTUAL MEETING



PREVENTION/PUBLIC HEALTH 15 MINUTES

- What are the key characteristics of your program?
- What approaches are used?
- Are mental health issues integrated into the program?
- What would be the most important advice you would give to a professional who is not specialized in substance use (e.g., teacher, social worker) regarding prevention?



FRONT-LINE ADDICTION SERVICES 15 MINUTES

- What is the structure of front-line service delivery in the field of substance use?
- What are the entry points for accessing services?
- Are the entry points the same for individuals who also have mental health issues?
- What would be the best advice you would give to a professional who is not specialized in addiction (e.g., teacher, social worker)?



SPECIALIZED ADDICTION SERVICES 15 MINUTES

- What is the structure of specialized addiction service delivery in your sector?
- What are the entry points for accessing services?
- Is this structure the same across the entire region?
- What services are available for individuals who also have mental health issues?
- What would be the best advice you would give to a professional who is not specialized in substance use (e.g., teacher, social worker)?

APPENDIX 2 – EXAMPLE OF CONSENT AND RELEASE FORM



Centre intégré
universitaire de santé
et de services sociaux
de l'Ouest-de-
l'Île-de-Montréal

Québec 

DÉCLARATION RELATIVE À UNE CESSION UNIVERSELLE ET ABSOLUE DES DROITS D'UN PARTICIPANT À UNE PRODUCTION AUDIOVISUELLE ET/OU UNE PRISE DE PHOTOGRAPHIE.

This form is addressed to every participant in an audiovisual production and/or photographic capture.

Full name (Block Letters):

Address:

City:

Postal Code:

Telephone:

Email:

Title/On-Screen Credit/Legend

I hereby consent to participate, without compensation, in the audiovisual recording and/or photographic capture, as described below.

I assign to the CIUSSS of the West Island of Montréal all rights to which I may be entitled as a result of my participation in this audiovisual recording and/or photographic capture, including all rights related to the use, promotion, and distribution of the recording and/or photograph(s), in whole or in part, without compensation, on the Internet, on DVD, in printed documents, on television networks, and by all means known or unknown now or in the future, without limitation as to time or territory.

APPENDIX 3 – EXAMPLE OF EVENT PROMOTION



The promotion of the Virtual Meeting on Resources should use the logo(s) of the organization, indicate the theme, the speakers, the date, and the registration modalities.

A link to the event registration platform should be accompanied with the announcement.

Virtual Meeting

Continuum of services to prevent and treat opioid-use-related disorders in Montréal

October 12th / 12-1 pm / Zoom

This meeting will provide an opportunity to become familiar with three Montréal-based programs that offer services aimed at preventing and treating opioid-use-related disorders (prevention, front-line and specialized services).

Resources and tools to support the referral and guidance of individuals at risk for, or experiencing opioid-use-related problems will also be presented.

MMaxime Miranda, T.S., Coordinator of specialized services in substance use
Drogue: Aide et Référence

Dr Nicolas Demers, family Doctor
GMF UMF Verdun

Dr Ève Guillette, Family Doctor and Medical Coordinator
Programme CRAN et Relais, CIUSSS Centre-Sud-de-l'Île-de-Montréal,
Direction Santé mentale et dépendance

Formation croisée
Équipe de recherche
Michel Perreault

Douglas
UNIVERSITÉ EN
SANTÉ MENTALE

Centre intégré
universitaire de santé
et de services sociaux
de l'Ouest-de-
l'Île-de-Montréal
Québec

LES IMPATIENS
Bill Market
Non titré (détail)
Crayons de cire, crayons de couleur et graphite sur carton
56 x 81 cm
© Collection Les Impatiens