



GUIDE TO THE ORGANIZATION OF A POSITIONAL CLARIFICATION ACTIVITY



August 1st, 2023, Version

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CREDITS AND MENTIONS

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

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TABLE OF CONTENTS

4 **What is Cross-Training?**

5 **The Cross-Training' Program on Mental Health and Substance Use Disorders**

Introduction

6

Typical Development of a Positional Clarification Activity

- 6 ◦ Plenary Conferences / Group discussions about Case studies / Service user testimonials / Presentation of Initiatives and Organizations / Closing Remarks

10 **Activity Planning**

Organizing a Positional Clarification Activity in 10 easy steps / Which moments are key to the activity's organization

16 **Activity Evaluation**

19 **Appendix – Presentation of Additional Online Tools**

- Guide for Preparation of Group discussions using Case studies / Moderator and Reporter Guide / Participant Guide / Timeline for the day / Budget Example / Certificate of Participation



WHO IS THIS GUIDE INTENDED FOR?

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 trainings, virtual meetings of organizations and observational internships are available on our website as well: formationcroisee.com

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

Perreault, M., Wiethaueper, 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

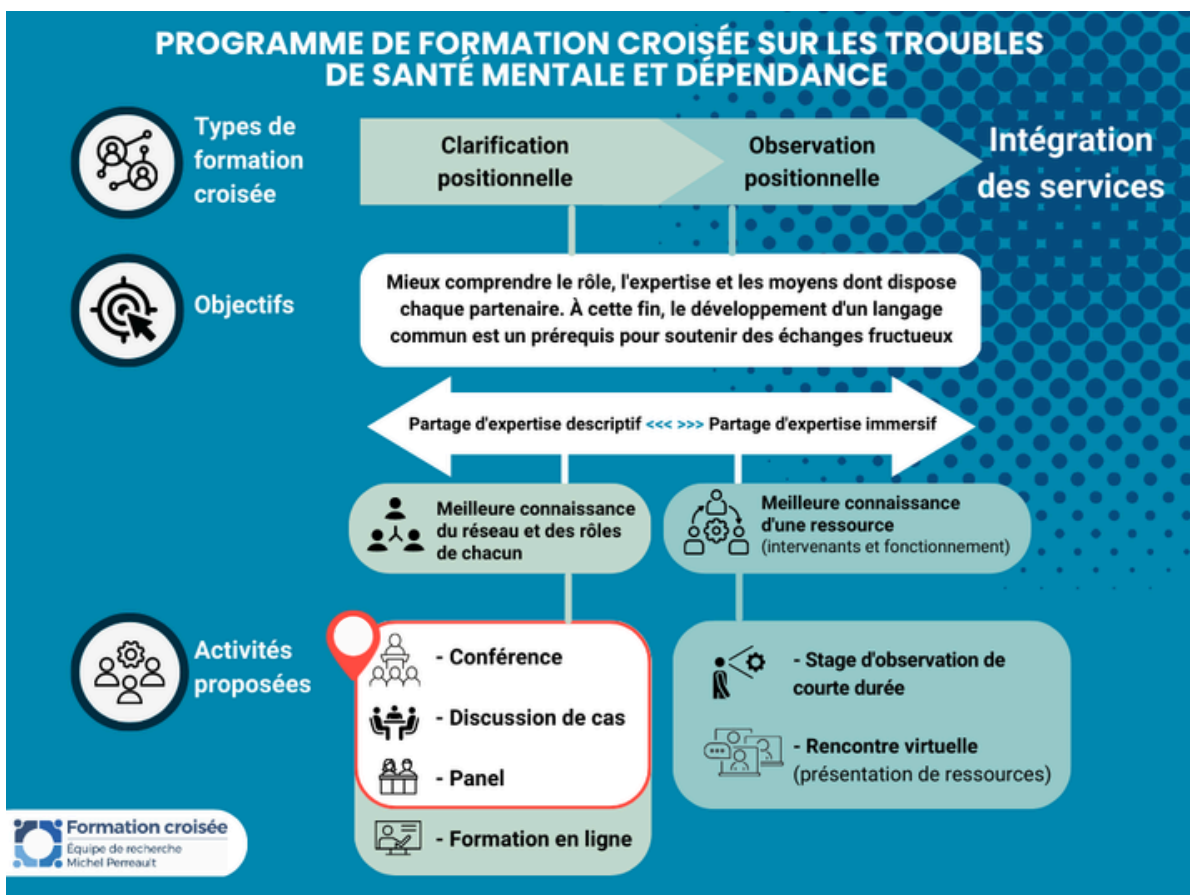


Initiated by mental health partners located in the south-west of Montreal in 2002, the **Cross-Training Program on Mental Health and Substance use Disorders** proposes training activities as well as interdisciplinary and intersectoral observational internships.

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.



INTRODUCTION



A positional clarification activity brings together, in the same location, professionals from different work environments in order to promote interactions among them. It consists of expert conferences, group discussions, testimonials from service users, and presentations of organizations. Thus, participants can acquire theoretical and practical knowledge as well as a better comprehension of the diverse roles of organizations to gain a common vision: to improve service continuity for individuals struggling with both mental health and substance use problems.

It is important to keep in mind that the organization of a positional clarification activity involves a significant amount of preparation work. The creation of a steering committee to assess conditions on the ground and select a theme, along with the active involvement of collaborators in organizing the activity, helps foster meaningful exchanges among partners—an essential ingredient for the initiative's success.

TYPICAL PROCEDURE OF A POSITIONAL CLARIFICATION ACTIVITY

1

PLENARY CONFERENCES

Three conferences focusing on the topic of the day are presented in plenary session, at the beginning of the day. Their objective is to transmit general knowledge, for example on aspects of prevention, clinical challenges, and treatments.

2

LUNCH AND GROUP DISCUSSIONS

During lunch, participants are invited to discuss case studies in small groups (the group composition should be previously determined by the organizing committee and aim to include a variety of networks). This case study will generally cover the whole continuum, from prevention, to clinical problems, including crisis situations.

★ Groups should ideally be interdisciplinary, intersectoral, and composed of participants who work in the same district or region.

3

SERVICE USER TESTIMONIALS / PRESENTATION OF INITIATIVES AND ORGANIZATIONS / CLOSING REMARKS

A presentation from a person with lived experience of both mental health and substance use problems allows us to identify pathways to better understand and intervene.

Presenting resources from different sectors helps raise awareness among participants and thus promotes a better alignment of interventions.

Finally, a closing conference provides an opportunity to review the day and open up further discussion on the topic.

1

PLENARY CONFERENCES

A typical learning exchange day begins with plenary presentations where speakers share their clinical and theoretical expertise with participants.

These presentations aim to develop a common language as well as acquisition of basic notions to better understand the challenges that lie with mental health and substance use.

Opening Conference

An opening conference sets the stage, presents the central theme of the day, provides, for example, insights on sociodemographic data or general information on the subject of discussion on the substance use aspect.

Presentations

It is important to prepare carefully beforehand by choosing diverse and relevant angles, ideally with the support of the steering committee.

Speakers should have a good understanding of the topics that will be covered throughout the day, as well as the audience that will be present. They should also be able to communicate clearly and effectively to capture the participants' attention and motivate them to actively participate.

3 TIPS TO PREPARE SPEAKERS

- 1 Define the day's objectives** so that the speaker can clearly understand the context of their presentation.
- 2 Communicate expectations** regarding the duration and key topics that need to be covered.
- 3 Provide information about the target audience**, notably their level of knowledge, experience, and the professional sectors participants come from.

2

GROUP DISCUSSIONS BASED ON CASE STUDIES

Group discussions are interactive sessions that take place during lunch where participants are separated into small groups and receive a case study describing an individual's situation that involves a complex situation with respect to obtaining care and services among many different networks in mental health and substance use.

This approach favors the integration of the content presented in conferences while allowing intervention workers from different fields work together to better understand the functioning of networks and each of their roles.

Group discussions also consist of a networking opportunity for participants who can discuss their daily practice, share ideas, and learn about new resources.

How to write an effective case study to achieve the intended goals?

- **Timeframe:** The case study covers a period leading from the development of the clinical problem up to a crisis situation. This allows participants to discuss aspects ranging from prevention to emergency intervention.
- **Intersectionality:** The case study evokes the presence of multiple actors surrounding a person experiencing a complex situation (school environment, community environment, health services, public safety, etc). This allows participants to discuss the contribution their profession/organization can offer in terms of intervention.
- **Co-construction of case studies:** The objective is to stimulate discussion among different partners and ensure that the case study provides the opportunity for each to demonstrate their understanding and share their intervention ideas. It is therefore important to involve different partners in the production of the case studies (choice of issues to address, writing and validation of case studies).

Discussion Group Composition

- Ideally, the groups should be interdisciplinary and intersectoral.
- Ideally, the group's participants should work with a clientele based in the same region.

3¹

TESTIMONIAL FROM A SERVICE USER

The testimonial from a person who has experienced mental health and substance use problems helps identify avenues for better understanding and intervening. By sharing the experiential knowledge with the audience, they help to clearly illustrate the impact of service continuity on the quality of life of service users.

>>> [Consult an example of a testimonial from a young adult with difficulties related to cyberaddiction \(audio recording in French\).](#)

3²

ORGANIZATION PRESENTATIONS

A platform is provided for organizations (including programs or services) from different sectors and various points of intervention along the continuum to make their organization known and encourage better coordination of interventions.

>>> [Consult an example of a list of resources along the continuum of services to prevent and treat issues related to the use of opioids in Montreal.](#)

3³

CLOSING CONFERENCE

The closing conference provides an opportunity to summarize or emphasize key elements that were discussed during the event, and to encourage reflection, while also encouraging participants to put into practice what they have learned.

It is important to choose a speaker who can synthesize the main points covered throughout the day and present them in a clear and engaging manner.



HYBRID MODALITY

In order to offer the possibility of external groups participating in the activity online, it is important to ensure that there are organizations and/or partners that can handle the technical aspects and facilitation of group discussions at the other site(s) involved.

ACTIVITY PLANNING



ORGANIZING A POSITIONAL CLARIFICATION ACTIVITY IN 10 EASY STEPS



1

Step 1 - Conduct a consultation with partners and/or members of the steering committee

This consultation will allow you to choose the theme of the day and identify potential presenters. Once the theme and speakers have been determined, select an appropriate date, and reserve the rooms needed to host the event.

2

Step 2 - Recruit presenters and promote the event

Approximately 3 months before the training day, recruit the speakers and discuss the content of their presentations with them. Make sure to also book the necessary technical staff, if needed. Once this information is confirmed, you can begin promoting the event by sharing a “Save the Date” announcement with the help of your partners.

3

Step 3 - Prepare the documentation (program, registration, and participant handbook)

Establish the detailed program for the event: this will give you a clear overview of the order of presentations and group discussions. Also, prepare the registration tool (e.g., Eventbrite), including a question about food allergies if a meal is planned. To ensure a smooth running of the day, also prepare the Participant Handbook, which will include information about your organization, the schedule of the day, the case studies, and discussion questions.

4

Step 4 - Promote registrations and prepare other supporting documents for the event

Two months before the event, share the detailed program, inform participants of the different registration modalities, and encourage them to reserve their spot quickly. In parallel, prepare the evaluation forms and certificates of participation that will be distributed to participants during the event.

5

Step 5 - Identify reporters and moderators and prepare their documents

As the event date approaches, complete the final preparations. Prepare the Moderator and Reporter Guide, which will support the effective facilitation of group discussions and note-taking. Also, identify moderators and reporters among the registered participants and invite them to take on these roles, providing them with the appropriate guidance materials.

CONTINUATION A POSITIONAL CLARIFICATION ACTIVITY IN 10 EASY STEPS

6

Step 6 - Carry out logistical follow-ups

Approximately two weeks before the activity, close registration and finalize the remaining logistical details, such as submitting the catering order if a meal is planned. Make sure you have received the speakers' presentations and prepare the Timing of the Day document to ensure that the time allocated for each presentation is respected.

7

Step 7 - Prepare name tags and the general presentation

One week before the event, create participant name tags, including information about the discussion group to which each participant is assigned. Also, prepare the PowerPoint that includes all speakers' presentations, including transitions and animations to ensure the smooth flow of the day.

8

Step 8 - Assemble the participant material

A few days before the event, assemble the participant folders, including the program, the participant handbook, and any other relevant documentation, for example, a flyer about your services or those of partners, a mini resource directory, etc. Ensure everything is set to welcome participants in an efficient and organized manner.

9

Step 9 - Send a reminder to participants

The day before the event, send a reminder to registered participants to confirm their attendance and remind them of the exact venue address, schedule, and information regarding parking and access by public transportation.

10

Step 10 - Event evaluation

Analyzing the evaluation forms will help you identify strengths as well as areas for improvement for future events. Use this information to produce a detailed evaluation report that can be shared with participants and partners.

Do not forget to delegate tasks effectively, communicate regularly with your team, and remain flexible in order to adapt to any unforeseen circumstances that may arise.

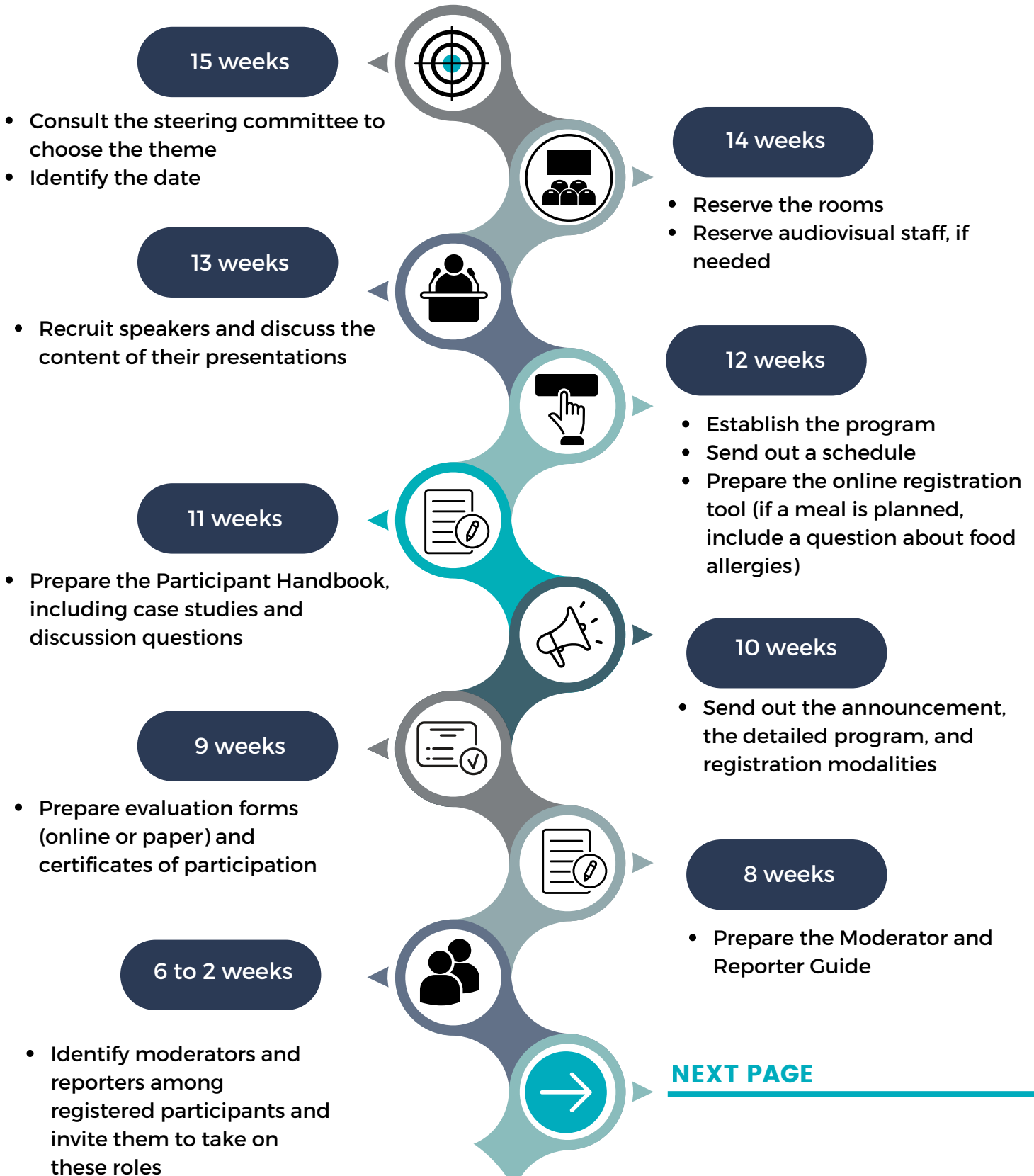


On the website www.formationcroisee.com, in the Toolbox section, you will find the Participant Guide template in Word format.

TIMELINE – WHAT ARE THE KEYS MOMENTS IN ACTIVITY PLANNING?



BEFORE THE EVENT



NEXT PAGE

CONTINUATION TIMELINE: WHAT ARE THE KEYS MOMENTS IN ACTIVITY PLANNING?

BEFORE THE EVENT

2 weeks

- Send the Moderator and Reporter Guide to the individuals concerned
 - Hold a meeting, if needed, to explain the roles



- Create groups of 10 to 15 participants for the workshops (interdisciplinary, intersectoral, based on proximity)



- Prepare the Timing of the Day document to ensure time limits are respected



- Close registration
- If a meal is planned, send the order to the caterer (or according to the selected caterer's timelines)



- Receive the speakers' PowerPoint presentations



- Prepare the Who Does What document so that all members of the organizing team know their tasks and roles



- Ask speakers to sign the consent form authorizing filming and dissemination



NEXT PAGE

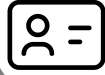


CONTINUATION TIMELINE : WHAT ARE THE KEYS MOMENTS IN ACTIVITY PLANNING?

BEFORE THE EVENT:

1 week

- Create participant name tags (including information about the discussion group they are assigned to)



- Prepare the PowerPoint containing all presentations (including transitions and animations)

BEFORE THE EVENT:

4 days

- Prepare the name tags
- Assemble participant folders with the program, the Participant Handbook, and other relevant documents



- Review the day's events with members of the organizing team

BEFORE THE EVENT:

1 day

- Send a reminder to registered participants



- Complete any final follow-ups with partners as needed (e.g., the caterer)

AFTER THE EVENT:

- 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 organizing the activity (in-kind contributions 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



Your opinion on the (title) Cross-training Activity:

Administrative region of your workplace:

1. What did you most appreciate during this activity?

2. What could be improved?

For the following questions, please select the answer that best applies to you, if applicable:

3. The activity...

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

...met my expectations

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

...offers enough time for discussion

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

...was relevant to my practice

...met my objectives

Strongly
Disagree

Somewhat
Agree

Strongly
Agree

...was well-organized

Strongly
Disagree

Somewhat
Agree

Strongly
Agree



NEXT PAGE

CONTINUATION EXAMPLE OF EVALUATION FORM

For the following questions, please select the answer that best applies to you, if applicable:

Throughout the day, I was able to...

...learn more about (add elements of the theme of the learning exchange day)

Strongly Disagree

Somewhat Agree

Strongly Agree

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

Strongly Disagree

Somewhat Agree

Strongly Agree

...learn the existence of new resources

Strongly Disagree

Somewhat Agree

Strongly Agree

...learn more about the functioning of other resources

Strongly Disagree

Somewhat Agree

Strongly Agree

...identify intervention workers from other resources that can guide me if needed

Strongly Disagree

Somewhat Agree

Strongly Agree

I work with a clientele in:

Mental Health Substance use Both Other

Je travaille dans le milieu suivant :

Community resource Readaptation Center Youth Center CLSC
Public Safety Hospital School Environment Other

Do you have a question or theme that you would like to be covered in a future learning exchange day?

Thank you for your feedback!

APPENDIX

**PRESENTATION OF
ADDITIONAL ONLINE TOOLS**



PRESENTATION OF ADDITIONAL ONLINE TOOLS



Guide to Preparing Group discussions Using Case studies

This tool provides examples of case studies for discussion. It is recommended that you consult and involve your partners in the case study development process in order to better reflect the issues and concerns specific to your setting. You will also find in this document questions to help guide the facilitation of discussions around the case studies.

>> Consult on our website



Moderator and Reporter Guide

This tool aims to provide those involved with essential information about the roles of the Moderator and the Reporter in the context of group discussions based on case case studies. It proposes a framework to structure discussions and ensure the smooth running of the activity.

>> Consult on our website



Participant Handbook

This document includes, among other things, information about your organization, the agenda for the day, the case case studies, and discussion questions. You will find a customizable Word version in our online Toolbox.

>> Consult on our website

PRESENTATION OF ADDITIONAL ONLINE TOOLS



Timing of the Day

This document provides a clear and detailed overview of the day's schedule and records key information, decisions, and actions taken during an event. Therefore, everyone involved in organizing the activity knows their role and the various tasks to be carried out throughout the event.

>> Consult on our website



Sample Budget

Organizing a learning exchange day requires careful planning, including budget management. This tool helps familiarize organizers with the main expense categories to consider when planning a learning exchange day.

>> Consult on our website



Certificate of Participation

The certificate of participation is a concrete way to recognize and highlight participants' involvement and contribution to your event. It reflects the importance you place on their presence and serves as tangible proof of their participation in the cross-training activity for an employer.

>> Consult on our website