Guide for Peer Match Facilitators

A Companion to Help on the Way

A Powerful Approach to Technical Assistance

Since 1995, as part of a broader effort to rely more intentionally on the direct experience of people working in the field, the Center for the Study of Social Policy (CSSP) has been working with several partners and funders to make peer matches available. Peer matches are structured opportunities for teams of people from different communities to learn from each other's experiences. The process enables people to develop options for action that build community capacity to improve outcomes for neighborhoods, families and children.

Preparing for a peer match

PEOPLE WHO DO SIMILAR WORK in states and communities often share experiences with each other. After all, the chance to compare notes and exchange strategies is what brings people together all the time in workshops, retreats, and conferences. The challenge in peer matches is to structure exchanges among peers that are responsive to their needs and simultaneously effective in keeping people focused enough to think about how they can apply what they are learning to improve results for their communities.

Facilitators for peer matches are responsible for a number of activities that take place before and after the consultation itself. Successful completion of these activities is an essential ingredient in the success of a peer match. Facilitators will have an administrative assistant at CSSP who will help with logistical arrangements and mailings, but the overall responsibility for advance preparation and closure is with the facilitator.

Good advance preparation:

- Leads to the clear identification of the requesting site's desired results, the learning goals that participants think will help them achieve those results, and the development of an agenda that addresses their needs.
- Ensures that the composition of both the peer TA consulting and requesting site teams are the appropriate individuals to address the learning goals;
- Makes sure that physical and social environments will be created that support constructive interaction between the participants.

In setting up a match, the facilitator seeks to maintain a balance between using procedures that have yielded productive matches in the past and remaining flexible enough to respond to each site's unique needs and circumstances. Sometimes this process can be fairly linear; sometimes there is a need for much more iteration. Figure 1 identifies the steps used to plan and conduct a peer match and offers a set of core questions for the facilitator to consider in each step.

Step 1. Clarifying the purpose, timeline, and team composition

After the decision has been made to conduct a peer match, the facilitator's first step is to initiate a conversation with one or more lead contacts in the requesting site. Key topics to cover at this stage include:

- Clarify the purpose of the match. A critical step is to determine what the participants hope to learn from the exchange and what positive results will occur for the community if the match is successful and the participants are able to act on what they learn from the exchange.
- Identify the right time for the match. Peer matches are most effective when their timing is appropriate. The facilitator helps determine if any upcoming events, decisions, or deadlines should frame the timing of the match, or if there are certain actions that must take place before the match. With this information in hand, a target time frame for the match is set. The facilitator then works backward from this timeline to determine a schedule for other pre-match activities.
- Put together the team who will attend the match. The facilitator should encourage the requesting site to think further about the ideal composition of the team. The facilitator can ask questions to help the site identify people who can be catalysts for a proposed plan for change after the peer match, including key partners or residents who are affected by the issues that are being discussed. The facilitator encourages the participation of parents and community residents whenever possible, in order to bring their voices, perspectives, and experiences into the peer match process and follow up action. The number of people in a team varies for each match, usually ranging from three to ten participants. Often CSSP dedicates some funds to give special honoraria to residents who need additional support to attend the consultation. The facilitator needs to check with CSSP about the availability of these funds.

figure one

Facilitating Peer Matches: Steps and Core Questions

Steps	Core Questions
1. Clarifying the purpose, time frame, team composition of the requesting site	■ What are the issues about which the requesting site wants to learn more? ■ What do the participants hope to gain from attendance at the match? ■ What is driving this need to learn? ■ Are there certain events or actions that need to happen before the match occurs? ■ Is there a deadline or a forcing event coming up that dictates the need to have the match by a certain time? ■ Who are the people who can cause something to happen? ■ Is there a role for parents and residents as part of the peer team?
2. Selecting & orienting the peer consultants	■ Does the peer consultant organization or program have a record of success addressing the issues relevant to the match? ■ Does it have hands-on experience with similar populations? ■ Can it pull together a team of individuals that substantially mirrors the team from the requesting site? ■ Are these individuals available and willing to serve as peer consultants? ■ Do the peer consultants understand and accept their role as peer match consultants?
3. Creating a focused agenda through pre-match conference call(s)	■ Have the desired results and learning objectives been sharpened or clarified more since the initial conversation? ■ Are there any special activities or site visits the group wants to include as part of the agenda? ■ Are there any written materials that need to be shared in advance of the match? ■ Are there any additional questions or concerns related to the learning objectives? To the match?
4. Conducting the actual match	■ Is the physical environment set up in a way that is conducive for the group's learning? ■ Is time provided for social interaction and personal sharing early in the match? ■ Does the format allow for exchange and application of insights to the challenge at hand (rather than show and tell)? ■ Is time provided for participants to identify what they learned and the next steps to be taken and make commitments for follow through?
5. Writing-up the match products	■ Has the facilitator circulated the notes that capture participant reflections and next steps for moving forward? ■ Has the facilitator (or other person assigned by CSSP) produced a summary report of the match?
6. Checking in with participants after three to six months	■ What progress has been made on the next steps identified during the match? ■ What has been the impact of the match? ■ Are there any requests for additional information or need for any informal exchange among the parties?

Step 2. Selecting and orienting the peer consultants

A key ingredient of a successful match is finding peers whose expertise makes them credible to the requesting site in working through its learning objectives and developing an action plan. The facilitator works with the requesting site to generate suggestions as to who the potential program or initiative for the peer match might be and/or who can help identify the best peer consultants.

Often, the requesting site has an idea about another community or initiative it wants to consult with. While these ideas generally are on target, the facilitator is responsible for investigating further and making a determination about whether it is the right match for achieving the desired results. The facilitator sometimes proposes an alternative match or additional peer consultants as a way to ensure that the learning objectives for the match are fully met. In a peer match, the aim is not replicating one site's approach, but creating a strategy that will work best for a specific locale or jurisdiction. Thus, it is sometimes useful to draw on a team of peer consultants from multiple sites that have used a range of approaches to address similar issues and concerns. Given CSSP's access to several TA networks and peer consultants, it can often provide the necessary support in finding the right match.

The facilitator then contacts the selected peer consultants to help determine their interest and availability. The facilitator briefs them on the issues and time frame for the match and shares information about the peer match process, its underlying principles, and the investment of time necessary to participate. The facilitator also informs them that a summary report of the match will be completed and the peer consultants will have access to the report.

Peer consultants do not get paid for the substantial investment of time and effort they make to participate in a match. Yet, the issue of monetary compensation rarely surfaces. Most people are happy to share what they are doing with others and they appreciate the fact that they will learn from the match too. Once they agree to participate, the facilitator works together with the lead peer consultant(s) to help assemble a team that closely mirrors the participants from the requesting site. The facilitator explains that people can more readily identify with the peer consultants and resonate with specific challenges and issues they might face because of the particular role that they play, be it as a government official, a director of a community-based organization, or a neighborhood resident. The facilitator needs to check with CSSP to see if special honorariums are available for residents who might asked to serve as peer consultants.

It is extremely important for the facilitator to orient peer consultants about the peer match process and how they can be most effective in their consultant role. All those who agree to participate receive descriptive materials about the peer match approach in advance. The facilitator refers participants to CSSP's publication titled *Help on the Way: Communities Get the Results They Want from Peer Matches,* which is found at www.cssp.org/uploadFiles/Help_on_the_Way.pdf The facilitator may also offer to send them hard copies if they prefer. In orienting peer consultants, the facilitator directs them to particular sections in *Help on the Way* that describe the process for making peer matches (section V) and identifies attributes of the peer consultants (section VI). Qualities that make peer consultants effective can be found in Figure 2.

The facilitator must devote some time at the beginning of the actual consultation to orient participants about the process and format. Two critical messages to convey to peer consultants are: 1) avoid a show and tell format and 2) ask effective questions about the results the requesting site wants to achieve, and the relationships, partnerships and resources that it has or needs to have in place to achieve those results.

Step 3. Framing the issues and creating the agenda.

The facilitator arranges multiple conference calls to ensure that all participants enter the match with a common understanding of the learning objectives and any important background and context that will help illuminate the issues being addressed. Initial calls may begin with an individual or small group from the requesting site, but subsequent conversations usually grow to include the other participants and the lead peer consultant(s).

The pre-match conference calls are especially important because they begin the get-acquainted process and help build trust among the participants, clarify expectations, finalize the list of participants from all sites, help identify written materials that can be shared in advance, and provide the opportunity to develop a jointly-owned agenda.

The facilitator prepares and circulates the notes from each call to all participants, the administrative assistant and CSSP's peer TA program manager. The notes serve to keep the planning process transparent and are also used to help shape a preliminary agenda, which is reviewed by all the participants before the match takes place. Sometimes, it is helpful to include site visits in the agenda so that people have an opportunity to see a strategy in action. In other cases, the time is better spent in focused problem-solving conversations.

Keep in mind that participants share and learn best when they are comfortable and prepared. Prior to the match, the facilitator makes sure the team members know what the appropriate dress is, where they are meeting, and if they are making any site visits (and may need, for example, to be prepared for extensive walking). This information is helpful to everyone, but especially residents who may not have a good sense of what type of clothes to bring or what to expect. Materials sent in advance can help prepare participants with additional knowledge, such as information about the other peers' roles, their accomplishments, and their challenges. Each team can be asked during a conference call to describe any materials it might wish to share, and if others agree these would be useful in advance, they are distributed for pre-match, airplane, or other travel reading.

Step 4. Conducting the actual match

Peer matches are most often hosted by one of the peer consultant communities, since in many instances the match includes tours and onsite observation. Most peer matches take roughly two working days. Because relationships are so important in peer matches, a typical agenda begins with an opening reception and meal. Activities to get acquainted during this event are important for building the group trust needed to work and learn together during the rest of the match.

Matches can be structured in multiple ways. However, it is particularly important to pay attention to the following components:

- Devote time for social interaction and personal sharing early in the match, preferably as the opening activity. This time builds a feeling of openness and trust that is essential for later productive work. In addition to the opening activity, be intentional about setting aside dedicated time for informal conversation throughout the match—whether it is a lunch or dinner out or a special event.

- Create opportunities for participants in similar roles to interact with each other. A carefully selected team, one that "matches" with the other team(s), will help everyone identify with their peers more readily. For example, if residents and city council members are attending the match, make sure they meet and have the opportunity to share with residents and city council members on the other team.

figure two

Qualities of an Effective Peer Consultant

Experience has shown that effective peer consultants:

- Understand that the aim of peer consultation is to help colleagues arrive at their own solutions to solve their problems, not to solve their problems for them or replicate any one model.
- Have substantive, hands-on expertise on the focus issues.
- Take time to learn about the politics and environment of the site they are assisting.
- Enter readily into a collegial relationship with participants.
- Pose thought-provoking questions to help participants tease out their problems, issues, and goals.
- Listen and communicate effectively.
- Are culturally sensitive and capable of constructively addressing issues of race, ethnicity, class, and power that may arise.
- Motivate and inspire participants.

- Prepare a well-crafted agenda, drafted in advance and in consultation with the participants. Preparing the agenda in a collaborative way provides an opportunity for sharing and joint problem-solving, maintains a focus on the issues and questions agreed upon in advance, and sets time targets for each component of the match. Because there are usually so many substantive areas about which the group can share experiences, the facilitator plays a key role in helping participants maintain their focus.

- Provide comfortable surroundings and a set-up that is conducive to balanced, interactive discussion. Experienced facilitators are very aware that the arrangement of the room has a strong effect on the participation in a discussion. Always use a u-shaped set-up or stagger tables in a manner that allows participants to see everyone's face.

- Maintain a neutral role as the facilitator throughout the match. In addition to regularly expressing appreciation for people's time, energy, and contributions, and clarifying and validating participant input, peer matches work best when the facilitator "teases out" sufficient discussion on key topics so that the discussion moves forward to resolve the agreed-upon issues.

- Assist peers in playing the role of consultants. Many people have been trained to make presentations at workshops and conferences, but they have not been trained to be peer consultants. The facilitator must provide this gentle guidance, always encouraging the peer consulting team to listen to the needs and goals of the other team and then respond to its questions and issues within the context of what needs to be learned (which isn't necessarily what the peer consulting team would typically present at a workshop).

- Provide time for reflection and commitment to follow-up actions. Peer matches close with a wrap-up session where participants have an opportunity to highlight what they learned, identify next steps, and make commitments to a plan or set of actions. This wrap-up session cements the accomplishments of the match in people's minds and also sets the stage for follow-up activities.

- Provide time at the end for participants to complete the match evaluation forms. The administrative assistant prepares packets in advance for all participants that include the agenda, the list of participants, any written materials the group agrees to share, and an evaluation form designed by CSSP to get feedback from participants about the quality and results of the match.

Step 5. Preparing written products from the peer match

The facilitator (or other person designated in advance) develops and circulates two written products after the match: a brief summary of participants' 'take aways' and next steps they committed to in order to move their agenda forward; and a more in depth summary that captures the substance of the match.

Immediately following the match, the facilitator writes and sends thank you letters (when possible via e-mail) to all participants from both the requesting and consulting teams. The facilitator also circulates his/her notes capturing the participants' reflections at the end of the match and the next steps they agreed to take.

During the month following the peer match, the facilitator drafts the peer match summary and sends it to the administrative assistant at CSSP to circulate to all the participants. The format used to draft the summaries includes: an introduction, setting the context for the match, description of the consultation (who was involved and what they hoped to learn), main lessons learned, participants reflections and next steps, and lead contacts. Examples of many peer match summaries can be accessed at www.cssp.org/major_initiatives/peer_tech_asst. All participants have an opportunity to review, amend, and approve the match summary before it is published and/or more widely distributed by CSSP and other sponsoring or match participant organizations. These summaries serve as:

- A record of the match;
- A reminder of the options for action considered during the match and the individual and collective commitments for action;
- A means for sharing the experience with others who need to be involved in implementing proposed solutions;
- A resource for other interested parties (the subject matter of matches is often of interest to other communities working on similar issues); and
- Tangible evidence that those who are called on to be peer consultants are doing highly valued work and help others learn from what they are doing.

Step 6. Checking in with participants

The facilitator checks back three to six months later with the requesting site's lead contact(s) to determine the impact the match has had and to discuss any emerging TA needs.

figure three

Peer Match Facilitator Check List

These guidelines are intended to help you organize a peer match. The suggested timelines are approximate and will vary according to match. However, the facilitator should expect to begin work within one week of their assignment

Within 1 week of assignment

- ☐ Contact lead person from requesting site
- ☐ Determine tentative timeline for the match (6 to 8 weeks timeframe is ideal)
- ☐ Finalize match dates
- ☐ Notify CSSP administrative assistant of tentative timeline and lead contact(s)

Within 2 weeks of assignment

- ☐ Hold initial conference call with requesting site's initial participants
- ☐ Select and recruit peer consultants and share contact information with CSSP administrative assistant
- ☐ Analyze and review Peer Match Fact Sheet to begin work with CSSP administrative assistant to plan logistics (e.g., travel, facility, meals)

3–4 weeks before match

- ☐ Fill in and send Peer Match Fact Sheet to CSSP administrative assistant
- ☐ Finalize composition of the requesting site team and send complete list to CSSP administrative assistant. Information should include: Name, Title, Organization, Address, Telephone number, and E-mail address
- ☐ Develop match agenda through facilitated conference call(s)
- ☐ Circulate draft agenda to all participants
- ☐ Draft confirmation letter(s) for participants and peer consultants and send to CSSP administrative assistant for distribution
- ☐ Share with CSSP administrative assistant all materials to be included in the packets for participants

1–2 weeks before match

- ☐ Finalize agenda, list of participants and any material pertinent to the match and give to CSSP administrative assistant to be mailed with packets
- ☐ Confirm match arrangements with CSSP administrative assistant

During match

- ☐ Collect participant evaluation forms and give them to CSSP administrative assistant immediately following the match
- ☐ Get resident honorarium forms completed, if any, and give them to CSSP administrative assistant immediately following the match for processing and payment

Within 1–2 weeks after match

- ☐ Prepare and send electronic thank you letter and the summary of participants reflections and next steps to be taken

Within 4–6 weeks after match

- ☐ Prepare draft match summary report and distribute to participants for review (include a deadline for receiving report feedback)
- ☐ Finalize report integrating feedback and share with participants and CSSP administrative assistant

figure four

Peer Match Logistics Guidance

Below you will find some questions to help you begin to prepare for the logistical needs of the peer match. A more detailed **Peer Match Fact Sheet** will be sent to you by e-mail to answer these questions. The Peer Match Fact Sheet must be sent to CSSP administrative assistant 3–4 weeks before the match.

GENERAL INFORMATION

Meeting location (city & state)?
Title of meeting?
Dates of meeting?
Start date & time?
End date & time?
Participating cities?
Expected number of participants from each site?
Meeting will take place at (hotel/meeting site/other)?
What date do you expect the participants to arrive?
What date do you expect the participants to depart?
Facilitator/Co-Facilitator 's name and contact information?
Will there be any residents, how many, and will they require honoraria and phone cards?

HOTEL INFORMATION

Recommended hotel(s)?
Recommended location of hotel (close to airport /downtown area/close to meeting site)?
Number of sleeping rooms (single/double)?
Will any meeting space be required at the hotel?
How many meeting rooms will be required including breakout rooms?
What will be the set-up style for each meeting room each day (U-shape/conference/classroom/theatre/rounds)?
Will you require meals (breakfast, am/pm break, lunch, reception, dinner)?
Will you require a separate room for meals?
Will you require audiovisual equipment?

GROUND TRANSPORTATION

Will there be a need for airport transfers?
Will there be any tours/site visits to other locations?
Are there any other activities planned outside of the hotel or meeting that may require ground transportation?
What type of vehicle will be required and for how many people?

Center for the Study of Social Policy

1575 Eye Street, NW
Suite 500
Washington, DC 20005
T 202 371-1565
F 202 371-1472
www.cssp.org