Community-Linked Evaluation
AIDS Resource Unit

CLEAR

2001

An Annual Report

Over the past year, the CLEAR Team and the CLEAR Steering Committee have worked vigorously in collaboration with Ontario’s AIDS Service Organizations to determine the main priorities of evaluation.

Through on-site visits, surveys and questionnaires, the three main evaluative studies are: Organizational Capacity Building, Education & Prevention, and Volunteer/Staff Recruitment, Retention and Deployment.

Additional to these three main studies is the Information Management Project. This project has been implemented with the encouragement of and in collaboration with the AIDS Bureau, Ontario Ministry of Health & Long Term Care. It will develop electronic reporting tools and templates for ASOs to utilize when reporting back to the AIDS Bureau their statistical information.

You will also read about several smaller project studies that will assist individual ASOs with evaluating specific programs, special projects and/or services.

Our goal remains: to measure the success that has been achieved by the outstanding work of Ontario’s ASOs.

These truly are exciting times! You will read throughout our Annual Report about the ongoing linkages between our collaborative working relationships with the Ontario HIV Treatment Network (OHTN), the Organizational Development Project (ODP), the Ontario AIDS Network (OAN) and the AIDS Community Action Program (ACAP) of Health Canada.

We remain grateful to the AIDS Bureau for their ongoing funding of this vital service that we have all come to know as CLEAR.
Following a year and a half of meetings, planning, policies, processing, projecting, some pontificating and lots of progress, CLEAR moved into full speed during this past year. The attention paid to all of those months of good thinking, excellent analysis and hard work on the part of the Steering Committee members in collaboration with the CLEAR Co-Directors and staff, resulted in a busy year of activities out in the field.

At its core, the Steering Committee’s job is to listen to and observe community needs in the area of evaluation, share those observations with those of the CLEAR team, review and set priorities for annual work plans and then let the team go, to implement that work. Throughout the year – we meet four times – we receive updates, monitor progress and engage in sometimes thoughtful, sometimes lively debate around problem solving or new questions that challenge the field team. This past year is the year that the Steering Committee moved past those developmental stages of any newly emerging organization (forming and storming) into a performance mode.

We are grateful to the high caliber of participation from all Steering Committee members. The rapport around the meeting table has been productive and professional, as the community representatives and the CLEAR unit team have become more comfortable with each other, our rhythms and styles and our capacity to add on to each other’s strengths. We are grateful as well, to our funder: The AIDS Bureau. Their continued support of CLEAR, including filling appointments to the Steering Committee and participating enthusiastically in our quarterly meetings, is acknowledged and respected.

We invite you to spend some time with this Annual Report. It is a report about “going”, about getting on with the necessary work. And about doing that with the participation and cooperation of numerous community-based AIDS service organizations (ASOs) across the province. This is a report about cooperation. You will see a number of large evaluation studies that involve the participation of multiple ASOs. We believe the results of these studies will have the potential to assist other ASOs across the province. Even individual studies, focusing on the evaluation question identified by one site inevitably grew to involve the participation of local community partners. Getting ahead of ourselves. Results from most of these studies – multiple centred and single sites – will be emerging during the coming year.

The CLEAR Steering members, appointed by the AIDS Bureau, are drawn from a broad representation across the province. They each make a commitment and give their dedicated time and accumulated wisdom to steering CLEAR. In this sense, steering CLEAR, rather than meaning avoidance, has meant a healthy sense of engagement. We believe that is reflected in this Annual Report. We welcome your questions or feedback.
CLEAR researchers have met with many ASOs this past year to determine ASO research and evaluation interests. Four large studies and studies individualized to a specific ASO program are now being conducted.

Throughout this Annual Report, you will read about the Organizational Capacity Building Study, the Education & Prevention Study and the Volunteer/Staff Recruitment, Retainment and Deployment Study. These three large projects encompass several different ASOs who share the same research interests and require evaluative information regarding these areas within their organizations. You will also read about the Information Management Project which is being conducted in collaboration with the AIDS Bureau to create electronic reporting mechanisms between ASOs and the AIDS Bureau.

It has been a busy past 12 months developing and implementing these large (macro) studies. You will also learn from this report about the smaller, individual studies being conducted that pertain to specific programs or services produced by a particular ASO. We will offer you an insight as to what types of studies are being conducted across the province to assist with measuring the success of AIDS programming in Ontario.

The CLEAR Steering Committee deserves a lot of credit for guiding us along this uncharted path. Without the generation of ideas, refinement of ideas, great direction setting and decision-making by the Steering Committee, CLEAR could not exist.

As the Co-Directors of the CLEAR Unit, we obviously do not work in isolation.

We are proud of the ensemble of workers we have as our invaluable human resources. Researchers, writers, statisticians, health economists, data analysts, secretaries, literature search reviewers, communications specialists, interviewers and clerical staff are all important ingredients that enable CLEAR to operate on a day-to-day basis.

Much thanks to Ontario ASOs; the CLEAR Steering Committee; the AIDS Bureau, Ontario Ministry of Health & Long Term Care; and to collaborative partners, AIDS Community Action Program, Health Canada (ACAP), Ontario AIDS Network (OAN), Ontario HIV Treatment Network (OHTN), and the Organizational Development Project (ODP). Thank you to all of you for sharing your world with us. We treasure the experience.

New study ideas from ASOs will be considered over this next year. So, if your ASO has an idea that you think might be an evaluation or research question, please contact us. We’re busy, but open for business.

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Currently, as shifts in the HIV epidemic occur, the challenge of mobilizing communities continues. In fact, the problem is compounded by many factors: continued stigmatization and discrimination against people living with HIV/AIDS, communities and individuals experiencing fatigue and exhaustion in response to HIV/AIDS; the more “favourable” medical outcomes in people living with HIV/AIDS and degrees of complaisance of response.

The demands facing ASOs necessitates that they have the organizational capacity and sustainability to adapt to the changing epidemic so that they can continue to provide high levels of community support.

This project was designed to explore ASO organizational capacity building in Ontario by identifying the current approaches to and future directions for organizational capacity building.

A literature review was conducted and abstracts were reviewed.

In acknowledgement that the HIV epidemic is a long term ever-changing problem, the Kotellos model promotes a multi-sectoral approach that involves capacity building focused on HIV/AIDS organizations, networks, and the community. Kotellos offers practical steps for the implementation of capacity building evaluation:

- Build consensus among organization staff and stakeholders around process of monitoring and evaluating capacity building.
- Conduct a baseline assessment of organizational and institutional capacity.
- Define the objectives and indicators to develop a strategic plan for capacity building.
- Monitor the process
- Conduct outcome assessments
- Analyze and interpret results in collaboration with stakeholders.

The primary objectives of this project are to develop a practical model which represents organizational capacity building as seen through the efforts of ASOs and to document successes in organizational capacity building of ASOs.

This project will be conducted in accordance with the following guiding principles: ASOs must agree to participate and individuals interviewed must be free to give informed consent for this study; the identities of individuals will remain anonymous; no information collected will be used in any manner by the ASO for performance appraisal or discrimination against any organization or individual.

Evaluation and research on the contribution of ASOs to reducing HIV infection and providing support for people living with HIV/AIDS are important outcome measures of success for many ASOs.

Participating ASOs will be closely involved in carrying out this study. The results should help to improve the ability of the ASOs to monitor organizational capacity and to improve their performance — thus contributing to a learning organization.
From a prevention perspective, ASOs are predominately involved in “primary prevention” activities. That is to say that ASOs offer outreach to targeted risk groups as well as the public at-large through their various education programs, services and innovative peer support activities.

Specifically, for HIV prevention, activities are directed at two levels:

- Identifying high risk behaviours and providing interventions to change behaviours to reduce the risk of acquiring HIV; and
- For those infected with HIV, providing interventions that reduce the spread of HIV to partners. People working in ASOs are well aware that the factors that can lead to the HIV spreading from one person to another are numerous and complex.

Many ASOs have told the CLEAR Unit that their prevention efforts are a priority area for evaluation.

Ontario’s ASOs are now searching for ways to evaluate their HIV prevention services, thus enabling them to determine how to best meet the challenges of the future.

The CLEAR Unit has been invited to work with interested ASOs to assist them with this evaluation activity.

First, to determine what is meant by prevention science from the perspective of an HIV prevention researcher, we conducted a thorough review of the HIV prevention and behaviour change literature. It is evident that prevention science has developed into a multi disciplinary network including diverse research fields.

The goal of the CLEAR unit is to take this one step further and to include community-based prevention practitioners from Ontario ASOs in the Prevention Science collective.

This evaluation project is designed to obtain the opinions and perceptions of ASO staff and volunteers on the following evaluation objectives:

- To identify the types of prevention programs that Ontario ASOs are currently conducting.
- To determine the ASO perspective of impact resulting from Ontario ASO prevention programs.
- To isolate the barriers and facilitators of implementing HIV prevention programs/strategies in Ontario ASOs. To ascertain the keys to successful implementation of prevention programs.
- To highlight the prevention programs that ASOs identify as organizational successes.

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**Education & Prevention**

**Lead Investigator:** Dr. Dale Guenter  
**Investigators:** Dr. Basanti Majumdar, Dr. Gina Browne, Dr. Greg Robinson  
**Staff Resource:** Rose Sokolowski, Emmy Arnold, Marijana Prica,
Workers in ASOs now need a wide range of practical skills and need to be knowledgeable about the following issues: medical treatments, counseling about employment related concerns, death/dying, bereavement, dealing with a culturally diverse clientele, accessing and coordinating community resources and assessing government entitlements.

This theme addresses the concerns of participating ASOs in Ontario to advance knowledge regarding factors related to the recruitment, retention and deployment of staff and volunteers. There are six participating ASOs in the theme. There are certain critical elements that will be addressed in every participating ASO:

- What are the stable and changing factors (workplace, structure, and function, and the nature of the work) that predict recruitment, retention and turnover in ASOs?

- What factors explain the transition from being a client to a volunteer to a paid worker?

While staff provide the professional and stable infrastructure to the organization, volunteer work is also central to the purposes of the ASO they serve. Volunteer work supports, compliments and extends the work of paid staff.

Volunteer work in ASOs saves the Ontario Ministry of Health and Long Term Care an unknown, but suspected to be, large amount. An important aspect of the project is to develop a costing method to value program activity in dollars. Therefore,

- What is the expense, in-kind and funded, of staff and volunteers in ASOs?

The participation of a number of ASOs allows for conducting specific projects of direct interest to a particular ASO.

These interests include:

a) What are staff and volunteer ideas about modifying their roles and what changes are noted from the introduction of these new ideas?

b) How can an expanded volunteer program extend capacity to provide more community services?

- What are the health and social service needs of clients and their current use of ASO and other community services and what are the unmet needs not currently being addressed by existing services?

- What workplace factors correlate with the rates of turnover and retention and staff satisfaction?

- What are the experiences and benefits of volunteering in an ASO?

The information gained in these individual projects and in the overall theme could be grouped into a larger data set that could inform policy change for ASOs in Ontario.
The purpose of this CLEAR Unit Information Management Project is to assist and support ASO community groups in their use of information and its technology. To offer assistance and support based on the assessment of their information needs, with the development of small databases and electronic templates for understanding their own activities and reporting these to the MOHLTC and others.

The Information Management Project includes three main activities: 1) collaborative work with ASOs on data management, 2) examination of large research databases for potential knowledge for AIDS Bureau and/or Service organizations, and 3) collaboration activities with the MOHLTC in developing electronic forms and analysis techniques for ASO reported information.

This collaborative partnership with ASOs will include four phases: A) assessment; B) implementation; C) support and review; and D) skill development.

One of the biggest challenges for community groups is how best to gather data. The CLEAR Unit is helping groups learn about gathering their own data and using this relevant data to help to make decisions for service. This project helps provide ASOs with their own readily available data and data management technology “know how” to supply them with the information they need to develop local programs and to advocate change where needed. The CLEAR Project works in partnership with organizations helping them collect raw data, put the data into context and to link the data to information that may be helpful in changing policy and practice.

Secondly, with the advent of large databases now accessible to researchers and organizations, such as the future Central Research Database at OHTN, much information will be available in raw form. It is understood that some organizations will need assistance at interpreting and understanding this information.

In addition the CLEAR Unit is collaborating with the AIDS Bureau in streamlining their reporting system, by gathering statistics from ASOs via electronic formats.

The CLEAR Unit Information Management Group has assessed 15 ASOs for their present state of technology and personnel resources for gathering and managing data. We are working with various ASOs in the development of small databases.

The group (Maria Wong, Ted Bailey, and Jackie Roberts) has been visiting ASOs that are participating in CLEAR Unit Research Projects. We have started working on various projects with persons at these ASOs.

Some activities that the ASOs have identified that would be helpful such as a client database, a staff activity sheet, and an intake form, have been completed.

We are also collaborating with the AIDS Bureau. We have pilot tested the sending of the activity report form by six ASOs in January. In addition, we have been working together with the AIDS Bureau, and the new electronic quarterly activity form for 2001 is nearing completion.

We wish to thank all the wonderful staff at the ASOs. They are so welcoming and so willing to let us try our best to help them with their information management activities.
IDS Service Organizations perform a multitude of programs and services over the course of a year. While support and education make up the main menu of most ASOs, the list of services extends well beyond that general categorization.

On any given day, service users may enter the agency seeking one-on-one support from the Support Services Coordinator, food from the food bank, financial assistance to help with the cost of medication or rent, a massage or reiki, literature on safer sex from the on-site Resource Centre, free condoms, to arrange for someone from the agency’s speakers bureau to speak to a group, child care, advocacy, a support group or just a cup of coffee with his or her peers. Whatever the reason, the door is open and helping hands are readily available.

It is the privilege of the CLEAR Unit to assist ASOs with evaluating the success and impact of these services and more. Whether it is the program, elements of a larger existing service or the agency itself, CLEAR can offer clarity to the evolution and future growth by evaluating the components that makes a service reach its full potential.

Over the past year, CLEAR has begun initiatives with various ASOs to evaluate the image of an organization, youth projects, cultural sensitivity programs, workshop evaluation, ASOs and prisons, supportive housing programs and substance use programs are all smaller or micro studies that CLEAR has been requested to assist in evaluating over the coming months.

While these smaller studies do not usually involve more than one agency, it is hoped and encouraged that the ASO will share with its colleagues and peers throughout the province, the results of these findings so that all ASOs will be better informed as to the impact of service delivery.

CLEAR cares about confidentiality. Therefore, we will not divulge the results from the studies without the permission of the participating ASOs.

While CLEAR can endeavour to assist in the evaluation process, with efficient communication and networking, it is the ASO and the staff that will learn from each other and their colleagues.
Building Proposals
By: Mark Bulbrook

How do ASO research and evaluation studies get started after an ASO contacts CLEAR? After a CLEAR researcher meets with you and transcribes your interests and background information, they produce a draft research proposal. CLEAR Staff revise draft documents with the guidance of the lead ASO contact(s) until a rough research protocol is agreed on. This insures that ASO ideas and interests are being appropriately and adequately expressed.

To complete a protocol, CLEAR Staff conduct a literature review, summarize the literature, and place what is known in the context of a study. Text, tables, figures, and graphs are added to the protocol by CLEAR staff. Researchers meet to discuss evaluation methods and tools. Often CLEAR uses both qualitative (structured ways of collecting stories and observations) and quantitative (numeric ways to measure things) methods. But, we always use the most appropriate methods to answer the evaluation question. Details are added to the proposal such as how to do the study in the field, timelines, and work plans (implementation); ethical issues, consent and review (ethics); how the data will be brought together (synthesis or analysis); making sense of the data gathered (interpretation); and how to get the findings of a study out to those who need to know (dissemination).

When the proposal is complete, ASO contact(s) are listed as the lead investigators with CLEAR staff as supportive researchers. When the ASO and CLEAR are satisfied, the proposal is submitted for ethics review at McMaster University. CLEAR supports and facilitates ASO choice along the way.

During the next year, ASO successes will be revealed. After the tedious phase of data collection, the process of making sense of the data will take place. In this exciting phase CLEAR staff will assist ASOs to develop knowledge (synthesis and interpretation), and decide how to convey the knowledge gained to the field (dissemination). We are sure that this will lead to many discussions by ASOs that will improve practice and policy. For CLEAR, the study is not complete without ASOs first discussing the implications of the knowledge gained and developing recommendations for practice and policy based on the study findings.

We hope that lead ASO investigators will want to tell colleagues about their studies at conferences, skills building sessions, workshops, and other group learning sessions; and share results through newsletters, abstracts, journals, and other media. CLEAR will support ASOs in any way we can throughout all phases of an evaluation study.
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