PEER RESEARCH IN ACTION II:
MANAGEMENT, SUPPORT AND SUPERVISION

Guta, A., Flicker, S., Roche, B.

Community Based Research Working Paper Series

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About the Authors

Adrian Guta holds a Master of Social Work (specialising in diversity and social justice) and is currently undertaking doctoral studies at the Dalla Lana School of Public Health and the Joint Centre for Bioethics, at the University of Toronto. His dissertation research explores the Canadian HIV community-based research movement, with the aim of better understanding and supporting ethical decision making in transgressive research practices. Mr. Guta has co-authored several articles on ethical issues in community-based research, and emphasises the importance of ethical and methodological reflexivity in his teaching. Mr. Guta is supported by an Ontario HIV Treatment Network student award.

Dr. Sarah Flicker is an assistant professor in the Faculty of Environmental Studies at York University and an Ontario HIV Treatment Network Scholar. Her research focuses on adolescent sexual health, HIV prevention, and community based participatory research methods and ethics. Dr. Flicker works across methodologies (qualitative, quantitative and arts-based) and seeks to partner with youth, students and allied practitioners on action research agendas.

Dr. Brenda Roche is Director of Research at the Wellesley Institute. The Wellesley Institute is a Toronto-based non-profit and non-partisan research and policy institute. Our focus is on developing research and community-based policy solutions to the problems of urban health and health disparities. Dr. Roche is trained in medical anthropology and public health, her research experience includes community-based research on social and health challenges for urban populations, including trauma and resilience for marginalized communities. Her current work focuses upon conceptual and methodological issues in participatory health research.

Executive Summary

Peer Employment: In Part II of this series we explore this labour relationship and highlight varying approaches to recruitment; hiring processes; contracts; wages, honorariums, and financial considerations; training; and support and supervision.

"Imagining" the Position of Peer Researchers on the Team: The first step in any peer research initiative should be for the team to 'imagine' the possibilities of working collaboratively, and establish a shared understanding of the meaning of "peer research." Many of the projects we heard from wanted peer researchers with lived understanding of a very particular (often personal) issue (such as living with mental health issues or being a drug user).

Recruitment Strategies: The projects we heard from relied on a mix of recruitment strategies to inform the community of their project and attract peer researchers. The formal and informal recruitment strategies used in community-based research initiatives were often interconnected. People who heard about projects through formal channels often went on to spread the word informally, both of which helped recruit engaged and committed peer researchers.

The Hiring Process: Research teams followed a range of approaches in the application and evaluation of hiring procedures. Interviews offered an opportunity for the hiring committee and peer applicant to assess the suitability of the peer applicant for the position.

Contracts: Following the hiring process, community-based research teams need to decide whether or not to use an employment contract with a peer. Contracts may help formalize work conditions and create standards that safeguard both parties involved.

Wages, Honorariums, and Financial Considerations: Decisions regarding payment via wages or honorariums can have an enormous impact on a peer researcher's financial security. Peers who receive public or private financial assistance (e.g., social assistance, employment insurance, or disability support) may have restrictions on what additional payments they can receive. In some cases, receiving additional payments may jeopardize their ongoing support. Honorariums do not typically raise such issues and, as a result, are commonly used to compensate peer researchers.

Training: Providing relevant training to peer researchers is critical if community-based research initiatives are to be successful. Formalized training can provide opportunities for peer researchers to develop their existing knowledge base and build capacity in areas where they lack experience. The complexity of many peer researchers' circumstances requires that training remain flexible, with opportunities for peer researchers to catch up (or for new peer researchers to be integrated and brought to the same level of the others).

Supporting and Supervising Peer Researchers: An important component of any kind of employment or volunteer relationship is support and supervision. Providing effective and ongoing support and supervision requires a commitment and investment from all team stakeholders (academics, community partners, and peer researchers). The project coordinator was usually responsible for providing supervision and support to peer researchers.

Conclusions: We have highlighted a number of key issues in recruiting, engaging, supporting, and supervising peer researchers. They provide a starting point for reflection and planning.

We encourage community-based research teams to:

1. **Imagine the Peer Research Position**
- outline the peer researcher role in advance, and create a Terms of Reference document to plan for how conflicts will be handled.

2. **Develop Recruitment Strategies and Hiring Processes**
- recruit diverse peer researchers through both formal and informal networks.
- work with peers, academic partners, and other stakeholders to create recruitment procedures that help ensure the peer researchers hired have experience with the topic (especially when it is of a sensitive nature).

3. **Establish "Contracts"**
- outline in writing what is required of the peer and the employer as a mutual safeguard.
- consider both hierarchical (business model) and holistic (talking circles) options to address conflict, depending on the nature of the group.

4. **Consider - Wages, Honorariums, and Financial Considerations**
- solicit peer input to establish the financial safeguards they need to participate.

5. **Provide Training**

- develop and implement training programs that reflect the requirements of the procedures peers will undertake, integrate peer interests, and provide additional training as necessary.

  6. Offer Support and Supervision

- offer support and supervision, and develop funding proposals that will accommodate the flexibility needed for community-based research.

- ensure a coordinator with adequate training and experience to effectively supervise and support community members is in place. The coordinator should have the autonomy and authority to make changes to timelines and schedules, and to balance the time needed for support and supervision.

Introduction

Community-based participatory research "emphasize[s] the participation, influence and control by non-academic researchers in the process of creating knowledge and change" (Israel, Schulz, Parker, & Becker, 1998, p. 184). The participation of community members in research is believed to enhance the validity of research findings and assist in ensuring that research results are used to inform and foster social change at the local level. The benefits of community involvement in research are well recognized; they include improved access to and greater representation of marginalized groups in research; data that are richer in quality and more authentic in their representation; and the creation of opportunities for local capacity building and empowerment. These benefits are often (although not always) realized through authentic partnership approaches that leverage the skills and assets of all team members (Minkler and Wallerstein 2008; Israel et al 1998; 2005).

Community members are thought to bring expertise that is informed by life experience to research projects, including perspectives on the issues at hand and insights about solutions. Actively engaging and involving members of the community in research has, however, not been without its challenges. Community-based research initiatives are often better at establishing partnerships among community representatives (i.e., agency staff) than among community members themselves (Flicker, Guta & Roche 2009). This finding raises critical questions about the assumptions that underscore community involvement in research (Dewar, 2005).

In an effort to achieve greater and more meaningful community participation in research, a rise has taken place in the number of projects that engage "peer researchers." Peer researchers (sometimes referred to as PRs) are members of a research project's target population who are trained to participate as co-researchers. In some cases, peer researchers partner in all facets of a research project. In others, they are instrumental in one or more aspects of a research project (e.g., participant recruitment and/or data collection). To date, there has been little critical discussion about the nature of peer researcher participation in community-based research.

The dearth of data on peer research in practice has meant that questions remain regarding the authenticity of community participation, how power differentials are addressed (if at all), and how participation may impact the lives of community members in social or economic ways that have not been fully appreciated (Roche 2008; Greene et al., 2009).

The Wellesley Institute has created a three-part series of papers examining the use of peer research as a model of Community-Based research in practice. In this series we consider Models of Practice; Management, Support and Supervision, and Ethical Issues as they surface in the context of Peer Research in Action.

Research Design and Methods

In 2007, we began to examine community-based research projects that adopted a peer research approach to better understand (1) the processes (recruiting, hiring, training, and managing) used with peer researchers in various aspects of community-based research; (2) the dynamics among peer researchers, their respective communities, and other members of the research team/hosting organization; and (3) the ethical, social, and practical issues that are particular to peer research models.

Our study began with a working definition of peer researchers as members of the target population who are trained to participate as co-researchers. This definition functioned as an important starting point and reflects our observations as researchers engaging in and supporting community-based research. In the course of our study, however, we learned that the definition of peer research and the role of peer researchers shift according to context, community, the nature of the project, the understanding of community-based research, and time.

Academic leads and community partners who had used peer research models in their community-based research in Toronto were invited to attend two focus groups to identify and discuss ethical, social, and prac-

tical issues related to using a peer research model.[1] Most of those who participated worked as research managers or staff at non-profit agencies in Toronto that were broadly engaged in addressing the social determinants of health.

Peer researchers were recruited for individual semi-structured interviews to discuss their experiences. The peer researchers who participated reflect a diverse group in terms of age, gender, sexual orientation, socio-economic status, culture, and ethno-racial identity. Sixteen individual interviews were conducted with peer researchers.

Interviews and focus groups were audio-recorded and transcribed verbatim for coding and analysis. We conducted a thematic analysis using a coding scheme drawn from respondents' verbatim accounts of their experience. Coded data were analyzed and compared by theme, range, and type of peer research involvement, as well as the nature of the experience with peer research for both service providers and peer researchers.

Peer Employment

In Part I of this series, we outlined three broad models of peer research, and indicated that hiring peers as "employees" was the most common model that we found operating in Toronto. Here, in Part II, we explore this labour relationship and highlight varying approaches to recruitment; the hiring process; contracts; wages, honorariums, and financial considerations; training; and support and supervision.

"Imagining" the Position of Peer Researchers on the Team

Our biggest challenge is supporting the women: finding them, bringing them to meetings, [and] sitting with them afterwards—the invisible work that we don't talk about. (Service Provider)[2]

The first step in any peer research initiative should be for the team to "imagine" the possibilities of working collaboratively, and establish a shared understanding of the meaning of "peer research." Preliminary discussions, or visioning sessions, will benefit from input by peers, community partners, and academics. These discussions should also address the role of peers and develop a scope of peer work. The following questions are an important starting point:

- What do we mean by "peer research"?
- What kinds of knowledge and experience do we want peers to bring to the table?
- What roles do we imagine peer researchers taking on?
- What personal and organizational supports will peer researchers need?

This step is essential to clearly articulate the position of peer researchers on the team and be able to attract applicants with the needed knowledge and professional and/or lived experience. Positive Spaces, Healthy Places community-based research study wrote: "we defined PRAs [peer research assistants] as people living with HIV who have a history and/or and understanding of the impact that housing instability has…"(Greene et al., 2009, p. 364).

Many of the projects we heard from wanted peer researchers with lived understanding of a very particular (often personal) issue (such as living with mental health issues or being a drug user). In addition, some projects wanted peer researchers to have specialized knowledge which would allow them to integrate into a research project (such as previous work experience or knowledge of service provision contexts). For some projects, ensuring that peer researchers had direct experience with the issue under study was not easy or straightforward:

[O]ne of the criteria we said was they had to be [a particular immigrant category] … then later on we realised, in the beginning they said they were, but then later on we realized they aren't … in the sense that … people won't disclose their [immigration] status. (Service Provider)

The above quote highlights the importance of establishing a shared definition of relevant concepts and categories at the outset of a project. Not only might team members have different understandings, but concepts and categories might be complex. For example, in some communities, the line between past and present experiences (e.g., related to who is a "drug user") may not be as clear as researchers imagine. In other communities, membership in a particular group may be fluid in different ways (e.g., sexuality and gender expression).

Recruitment Strategies

The projects we heard from relied on a mix of recruit-

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1 Projects were identified from among those that had been funded in full or in part by the Wellesley Institute.
2 Many of our participants were affiliated with academic and community based organizations. We have chosen to use the label "service provider" as a way to differentiate these researchers from "peer researchers."

ment strategies to inform the community of their project and attract peer researchers. These included placing "word-of-mouth" posters in targeted community spaces and during public forums and conferences.

Recruitment was often conducted both formally and informally. Formal recruitment strategies included placing flyers or posters prominently on community information boards:

> They are having a group, they invited all the community members, they are going to talk about our problems … they put flyers all over … they said they want all the community members to participate. (Peer Researcher)

Informal recruitment strategies involved a peer receiving encouragement to apply by someone in the community or as the continuation of a related project. Many community members who applied to be peer researchers received encouragement to do so from a personal contact.

> Program workers for the [drop-in] center that thought I'd be well suited for the project and asked me to make contact with the project and see if they'd like me on the board. (Peer Researcher)

> My mom, she knows about these kinds of things … and she said you and [your sister] should go do it, you are getting paid, and it might be pretty interesting, so we did, and we decided to continue it, just because it's fun and you are still getting paid, so, when you don't have a job, like, that's always nice, and you are learning a lot. (Peer Researcher)

The formal and informal recruitment strategies used in community-based research initiatives were often interconnected. People who heard about projects through formal channels often went on to spread the word informally, both of which helped recruit engaged and committed peer researchers.

When the call for peer researchers was put out to a community, the response could vary from only a few to too many interested people. Many teams opted to over-recruit for peer positions to account for high rates of attrition. This approach is common when working with marginalized populations and individuals with complicated lives.

The Hiring Process

Open calls for peer researchers can attract a range of community members—students, activists, academics-in-training, people seeking a second job, and people seeking an entry point for paid work. Research teams followed a range of approaches to application evaluation and hiring procedures. In some cases, they adopted an informal hiring approach. In other cases, they adopted similar procedures to those that they would use to hire agency staff:

> [W]e're going towards having more formalized processes in place, even when we're recruiting peers, we're … leaning towards … having a screening process in place, where they have to apply, and show their commitment, and they'll have to fill out forms, and then also possibly sign contracts. (Service Provider)

The benefits to the research team of a more formal hiring approach include having a transparent process and laying out clear expectations. For peer researchers, this approach can be an opportunity to increase familiarity with job applications and hiring processes. While the primary goal of peer initiatives is not to increase employability, improving comfort and familiarity with the hiring process may be useful for obtaining future paid work. However, these employment skills can also be provided during the life of the project.

A formal hiring approach may not be appropriate for every community. In some communities, the process could be exclusionary and alienating. A formal hiring approach may also increase the administrative burden placed on organizations, and require them to take on a greater human resource management function. Organizations should consider their current capacity in this respect.

Interviews

Interviews were often used to help determine which peer applicants would be chosen to work on a given project. Interviews ranged from brief informal sessions to full-length meetings with multiple interviewees:

> I was interviewed by four different people in the same room, which was a bit intimidating. I must say … I felt that I was okay there, but it was intimidating … having been a long time since I been in a job interview … they were very friendly … they each went around the table and asked me certain things. I guess they all had areas of expertise … I'd never been interviewed by a committee before.

(Peer Researcher)

Hiring committees typically reflected the composition of the research team with primary representation from academics and community service providers. Less frequently, peers were included in hiring committees; for example, a member of a peer advisory committee might be asked to participate on a panel. The presence of peers in hiring committees may help peer applicants feel more at ease. It may also provide peers with the opportunity to pose unique peer/community questions to peer applicants.

> I have a client advisory committee, so I'm going to invite one of those members to be on the hiring committee, because it's always nice to have a member of the community be part of that, and have interview questions. (Service Provider)

Having peers involved on hiring committees demonstrates a greater sense of integration of community members as researchers throughout the research process. If the peer research approach is understood to increase the comfort level of community members in a research setting, then it may have a similar effect in hiring interviews.

Interviews offered an opportunity for the hiring committee and peer applicant to assess the suitability of the peer applicant for the position. They also signalled the ability of those on the committee and the peer applicant to work together. For service providers, interviews provided an opportunity to meet peer applicants and get a sense of their interests, the skills they offer and could benefit from gaining, and their ability to work in a team environment with supervision:

> I'm looking to see what they bring, and look at what they need, and see if what they need is something the project can actually give them in terms of getting their skills up to a level that's actually going to be successful. (Service Provider)

> [M]ainly it's soft skills … having a good personality, being outgoing, someone that someone would want to talk to, because the other stuff you can teach … and they have to believe in the project … and they have to have a certain inherent respect for the people they are going to be interviewing … and they have to be able to work well with others, and … show some recent history of being able to be punctual, to make some commitments, to have

some things in place that kind of organize their personal life … I'll ask the question "how do you got to places on time" … if they can't answer that question, that kind of tells me a little about where they're at, so, its important to understand the community you're hiring from. (Service Provider)

Much like traditional job recruitment processes, interviews were not the sole deciding factor for peer employment. Personal or professional references were also included as part of the hiring process, enabling the hiring committee to make a more informed choice. Checking in with other members of the community about how well the peer interacts, communicates, and manages difficulties with other community members was one way of determining suitability for those individuals without more conventional "professional" references:

> I always like them to name a couple of people, because people sometimes are really different in one setting than they are in the other … it's really important to have good standing in the community, like you can interview someone … and they seem great … and then you put your feelers out into the community and you feel like people don't like this individual, he doesn't get along well with other people … no one will speak to that individual. (Service Provider)

Contracts

Following the hiring process, community-based research teams need to decide whether to use an employment contract with a peer. In the projects we heard from, this choice was often determined by the agencies or the service providers involved, and the type of position the peers were offered (peer researcher or peer advisory council). A peer contract was usually based on a standard employment contract—outlining the peer's role and responsibilities, the commitment expected of the peer, and the team's responsibilities.

Contracts may be seen as legitimating particular types of research involvement and particular community concerns. Moreover, contracts may offer assurance for the peer, and serve to demonstrate employment readiness in the future:

> [P]eople have been excited by contracts, because it kind of legitimizes the work that they're doing … so sometimes … it's really helpful to kind of reflect

real employment kind of conditions, because it gets them ready for the next step. (Service Provider)

[Contracts] can be really important for newcomers when you think Canadian experience, right … if you actually have a contract and can say you've been working. (Service Provider)

Signed formal agreements can also offer reassurance to community members who have had negative volunteer or research experiences with institutions previously:

[O]ne of the peers I hired for a couple of projects I did worked for another agency where they didn't have a contract, they had a lot of verbal agreements, and the agency did not live up to those agreements, and this individual was quite hurt, and was in a financially really strapped situation, a really powerless situation, um, and it was really important I think, when you're doing peer projects, that they get to see a really positive model of how you can be involved in agency work. (Service Provider)

Contracts may help formalize work conditions and create standards that safeguard both parties involved. Specifically, they can lay out clearly the agreed upon roles and responsibilities. Moreover, contracts can be helpful to establish and then navigate through peer employment difficulties. These issues are addressed in the "Supporting and Supervising Peer Researchers" section of this document. The following issues should be addressed in an employment contract. For a discussion on the possible benefits of not using a formal contract, see Elliott, Watson, and Harries (2002).

Wages, Honorariums, and Financial Considerations

Financial compensation is a critical issue in community-based research projects. Some projects that we heard from offered peer researchers a wage, reflecting standard employment processes. Others offered an honorarium, which has its roots in compensation practices for research. Decisions regarding payment via wages or honorariums can have an enormous impact on a peer researcher's financial security.

The type of compensation offered to peer researchers was usually determined by two considerations. The first was the funding available. Project funding is often limited, and the amount of compensation available for peer researchers and study participants is often restricted. The second was concern about the harms and benefits associated with offering waged employment versus honorariums for peer researchers who may be receiving other types of social assistance. Peers who receive public or private financial assistance (e.g., social assistance, employment insurance, or disability support) may have restrictions on what additional payments they can receive. In some cases, receiving additional payments may jeopardize their ongoing support. Honorariums do not typically raise such issues and, as a result, are commonly used to compensate peer researchers.

I think there's a lot of flexibility, whether or not they're considered an employee by the tax man, or an employee by the agency … how much you can actually contribute to somebody's income without messing them up if they're on ODSP or whatever, on some kind of support, is a really fine one, and I think that's the one that's kind of the important one that you do, it's like "how do we do this, how do I give you some support here, and you know, recognise that you're contributing to the project here without messing you up." (Service Provider)

Projects need to be highly sensitive to the needs of peer researchers with respect to financial support and the repercussions of salaries. Where direct payment of honorariums is problematic, some projects offer compensation in other ways, such as bus passes or store gift certificates. However, the complex and highly involved roles of some peer researchers (which can sometimes resemble a "9 to 5" job) were clearly over and above occasional volunteer positions. In projects that are able to support a salaried peer position, the short- vs. long-term costs and benefits of creating such a position should be discussed. For community members who are interested in re-joining the workforce, such a position could prove to be an important step toward future employment.

Training

Providing relevant training to peer researchers is critical if community-based research initiatives are to be successful. Training can also be understood as directly related to the larger goal of community capacity building (Greene et al., 2009). All of the projects we studied provided training on various aspects of the research process. Most training was task specific and

focused on the duties peer researchers would be performing in the project (administering surveys, conducting focus group, etc.):

> [W]e sort of realised early on, that if we are to use a peer led approach, training would have to be essential, so we sort of made a commitment from the beginning to have a good in-house training program, and we've done, so we have ongoing trainings, reflective of the different projects, the stages they are in. (Service Provider)

Formalized training can provide opportunities for peer researchers to develop their existing knowledge base and build capacity in areas where they lack experience. Peer researchers often came together for the first time as a group at the start of training. This made it an excellent opportunity to establish ground rules for inter-group communication, responsibilities, and expectations. For example, one project started its first training session by reviewing and signing project documentation (contract, description of position, and code of conduct) as a group. Training should be community appropriate, and reflect the needs and abilities of peers. For example, the Toronto Teen Survey developed age-appropriate training materials and worked around youths' school schedules (Flicker et al., 2008).

The following example, outlines the roles and responsibilities of peer researchers and coordinators in plain language. Although they are intended for use in the field, the process of developing ground rules can start collaboratively during training.

COORDINATOR WILL:

- Tell you each week where you will be surveying (which meal program or shelter)
- Provide you with a TTC ticket to get to/from each survey site (for sites that are far away, we may take a taxi together)
- Provide you with a copy of a consent form and survey for each interview
- Provide you with a pen and clipboard
- Recruit and screen all potential respondents
- Set you up with people to interview
- Remain at the interview site for the duration of your shift to assist with any difficulties that might come up
- Pay respondents after each interview

- Collect the surveys and take them back to the office after each shift
- Pay you "honorariums" once a week, in cash, at the weekly meeting. The rate of pay is $15 per hour. We will not be able to give advances under any circumstances.

IT IS YOUR RESPONSIBILITY TO:

- Get to each site location (shelter or meal program) on your own
- Arrive at each site 15 minutes before your shift is scheduled to start
- Let coordinator know if you can't make one of your shifts—failure to do so will mean that you do not get any more shifts
- Conduct yourself in a non-judgmental and respectful manner → this includes language and appearance
- Maintain confidentiality → do not reveal the identity of anyone you interview and do not discuss the information that people reveal to you during interviews
- Maintain survey integrity → do not reveal eligibility criteria or future survey locations
- Identify your own conflicts of interest and assist with identifying duplicate interviews

The nature and length of training differed from project to project. For example, the project described below used a condensed approach upfront, followed by supplementary training:

> We just did a one day, where we talked about community-based research and using arts-based methods, and focus groups, because the peers, we facilitated groups together, we did ongoing support and training, and then we met weekly. (Peer Researcher)

Others had more formalized training programs, which were spread out over several weeks. This training approach was often preferred when peer researchers were integrated into all stages of data collection and/or when there were multiple forms of data collection:

> [N]o, no, it went over, they were half days, and they went over a good three or 4 weeks, for the first [phase] and, and then its ongoing, that was

the intensive, but there's always coming back for debriefing, they piloted, it, it doesn't stop in terms of training. (Service Provider)

Research teams need to balance issues related to the complexity of the research with practical considerations when developing training curriculum and materials. The length of training should be proportional to the complexity of the tasks peer researchers will be required to do, but it should also be considerate of people's time and availability. Sitting through full-day training sessions on any topic can be challenging, especially when one has competing demands.

Some training successfully went beyond the immediate task-oriented needs of the project and provided peer researchers with a broad knowledge base and a range of skills that could also be beneficial in academic research:

[E]ach site did it a bit differently, so it's hard to say, um, you know, how many hours of topics they had to cover, we did content both in terms of what the questions were about, but we also did things about health promotion, social determinants, anti-racism, anti-oppression, as well as research skills, so content specific to our questions, then kind of value based, philosophy kind of training, and then research skills training. (Peer Researcher)

In another example, the project integrated two whole training days that explored the meaning of health, health promotion, and the social determinants of health, and included discussions on inclusion and marginalization. The training components appear below.

Training Components
- introduction overview of the project (meeting project stakeholders)
- ground rules, expectations, and available supports
- conflict resolution and mediation
- anti-discrimination and equity
- ethics review process, recommendations, discussion and decisions
- methods training (with clear explanations of why data are being collected in this way)
- opportunities for practice and role play

Many of the peer researchers we interviewed brought a wealth of experience from previous volunteer or employed experience, and even previous academic training they had received. Several peer researchers had undergraduate and graduate training in research methods, and had been involved in research studies previously. Although this may seem surprising, many of our participants were newcomers whose education has been undervalued in the Canadian labour market (Fong & Cao, 2009). The following quote illustrates the ways in which one peer brought her pervious knowledge into her current work:

I have not been here long—but when I was in school back home, I did some kind of research, kind of I studied. So, I know, like, how to identify yourself as a researcher and also the participants, and so I try to put that boundary, like, sometimes you know my friend—or even anybody—sometimes even you take the time of the participant and then you start talking your own life story, you know. So I tried as much as to avoid yet to let them talk, you know. That's to … to let it flow. (Peer Researcher)

The knowledge and skills peer researchers have can also complement other aspects of the project, and may create alternative avenues of participation for peer researchers in the larger research and dissemination strategy.

In certain ways we worked together but very separate because we all had different skill sets. Like, one of the research assistants was incredibly gifted in terms of any kind of computer stuff, working tirelessly on designing posters, flyers, this type of stuff. (Peer Researcher)

Finally, some peer researchers have been participants in research studies in the past. This background is very important but often an underappreciated perspective. It gives a peer researcher unique insights into research practices and the experiences of participants:

I was involved with a lot of similar projects when I was doing my B.A. at [University]. I had a professor who does a lot around housing and homelessness, and I was just finishing school and looking for work and he sent me an email about it. (Peer Researcher)

Maybe it's because I have some previous knowledge, or maybe I just put something, maybe extra effort, yeah. (Peer Researcher)

Even the most comprehensive training may not meet the realities of the field. For some peer researchers, clear training gaps were identified through the process of conducting the research.

> [B]ut then the other piece of them was to debrief, to kind of do training, to be like "what's happening that's difficult, how do we deal with it?" like, problems solve, that kind of stuff, so that was kind of the ongoing training piece. (Service Provider)

Regardless of the training model chosen, peer researchers were more likely to see the process as participatory if their input was taken into account.

Training Challenges

Although many community-based research practitioners draw on their own training or research experience to develop training modules, training sessions for peers are not academic classes, and training must be adjusted to meet the needs of peer researchers. For example, managing personal feelings emerged as an important training issue for peer researchers. On some projects, there was a conscious effort to address issues of emotional distress or trauma that could surface for peer researchers:

> [A]nd depending on the issue, the other thing I really to do in my trainings and my supervision is "how do you manage your personal feelings, that are gonna come up in the project," because, you know, some of the questions they may be asking people are things they may be struggling with, things they're dealing with, things that they do. (Service Provider)

One project, for example, included a discussion of "vicarious trauma" in its training to help prepare participants for the possibility of experiencing complex feelings when engaging with community members in the field. In another study in which peer researchers were former drug users, there was concern over how interacting with current users might affect their status (Elliott, Watson, & Harries, 2002).

The complexity of many peer researchers' circumstances requires that training remain flexible, with opportunities for peer researchers to catch up (or for new peer researchers to be integrated and brought to the same level of the others). This necessitated the need to anticipate and accommodate unexpected interruptions resulting from personal needs (for example, a sudden illness or personal crisis). These issues serve to highlight the theory vs. practice of capacity building and the limitations of existing resources within most projects:

I think one of the other challenges when you're training peer interviewers, depending on, again, who your community is that you're recruiting from, is that if they miss a training session, they still need that training, so how do you do an elaborate training session for one individual, it becomes like, time capacity, it's a whole, there's that team building, that team discussion piece that gets lost. (Service Provider)

Finally, Elliott, Watson, and Harries (2002, p. 177) suggest "joint training and debriefing sessions leading up to, during and following the undertaking of fieldwork." Such sessions would ensure that all project stakeholders are aware of one another's unique perspectives and skills. Further, Coupland and Maher (2005) emphasize the importance of evaluating peer researchers according to "performance-based criteria" that acknowledges their expertise and takes into consideration organizational support of their work.

Supporting and Supervising Peer Researchers

An important component of any kind of employment or volunteer relationship is support and supervision. In peer research initiatives, it is easy to underestimate the amount of support and supervision needed (Elliott, Watson, & Harries, 2002). When the peer researcher role resembles paid employment, it should be provided with support and supervision related to the guidelines and objectives agreed on for the role. How can someone know if they are performing in a satisfactory capacity without supervision, and how can they improve without support? The same questions can be asked about the roles of research coordinators and research assistants in research studies. They too need support and supervision to develop the skills needed to effectively conduct research. For example, despite all the training allotted to graduate students, they may still require mentoring in the field. Yet, we may expect peers to perform similar tasks without such support.

Community-based research differs from traditional research in the complexity of the relationships it forms and its commitment to long-term capacity building. However, not all collaborators enter into these relationships with the same skills, experiences, expectations, and capabilities. Specifically, peer researchers may have different support and supervision needs. For researchers who have been trained

in traditional research, the additional requirements of community-based research may be unanticipated.

In this section, we define support and supervision and explore related issues from the perspective of academics, community partners, and peer researchers.

Defining Support and Supervision

Support can be thought of as meeting the emotional and personal needs of community members who require assistance and accommodation to fully engage in the research process. For example, a focus group or data collection session could upset an individual. Support would involve helping the person to debrief and process his or her feelings. Although many service providers already understand the need (and may have specialized training) to provide such care, many academics do not because that need is rarely discussed in traditional research.

Supervision can be thought of as guidance, mentoring, and an opportunity to provide constructive feedback. An example of supervision is discussing a particular event (a focus group or survey collection session), and reviewing which aspects went well and how future sessions could be improved. Supervision may be familiar to academics (who received supervision throughout their thesis) and service providers (who receive supervision on their cases), but it may be unfamiliar to peer researchers. In fact, supervision may even seem intrusive to individuals who are not used to, or uncomfortable with, receiving feedback about their performance. How this feedback is framed and delivered is critical.

We chose to discuss support and supervision together because many study participants spoke about them as being interconnected, and linked them to other aspects of the project:

> [Y]ou talk about providing support, and part of that support is the training, and talking about what's happening with the work, and what's going on, and then each stage there's a refresher, ok, now we're at data collection, this is what we talked about, this is what we're doing, and then we've moved it forward. (Service Provider)

> [W]e had weekly meetings as well, that were partly to just sort of, logistics, like to schedule people, to pay them etc., but then the other piece of them was to debrief, to kind of do training, to be like "what's happening that's difficult, how do we deal with it?" like problem solve, that kind of stuff, so that was kind of the ongoing training piece. (Service Provider)

The above quotes demonstrate the way in which service providers often combined support and supervision: supervision (often during team meetings) was used to refresh training and create an action plan for the future, but also served as opportunities to provide support (individual and group debriefing). Group supervision has been shown to be an effective way of creating dialogue between learners, and can result in the "supervisor" withdrawing and letting the supervised take the lead in processing their own issues (Christensen & Kline, 2001). Group debriefing not only creates additional opportunities for support but also promotes team building, while at the same time emphasizing community ways of knowing to address the difficulties encountered in the research process.

Providing effective and ongoing support and supervision requires a commitment and investment from all team stakeholders (academics, community partners, and peer researchers). There may be times when support and supervision needs overlap, and boundaries have to be drawn. As described earlier in "The Hiring Process" section, the two may not always be compatible. Boundaries may also have to be drawn between personal and professional support. Below, we consider the roles, responsibilities, and issues related to support and supervision for each stakeholder group.

The Perspectives of the Key Stakeholders

ACADEMICS

Academics who partnered on community-based research projects recognized the benefits of trans-disciplinary learning and collaboration, which provided alternative ways of thinking about community engagement and highlighted issues they were not aware of:

I come from a more academic background than community, and to do good community-based research you almost have to have a strong social worker/community engagement background to be able to, to have these good things in place, about how to train people, or yourself, around where to draw boundaries … all the community engagement training, those are such valuable trainings, that I'm just starting to learn. (Service Provider)

While academics were rarely involved directly in support and supervision, they had an important role in thinking critically at the outset about the connections between theory and practice, as well as developing funding proposals that would allow for flexibility and innovation throughout the project.

[W]e realized shortly into the project, this person had an undiagnosed learning disability, you know, so that changes everything, and that's the stuff that's often hard to plan for, that can really cause chaos with your budget, now you need to invest a little more time in that individual because they come with a lot of really positive things, but here's this thing that's going to change how they learn. (Service Provider)

The kinds of issues identified above often only emerge after the study has been designed and funding acquired. These issues may not be apparent to academics branching out into community-based research, and they are not identified by research funders.

COMMUNITY PARTNERS (CLINICIANS, COORDINATORS, AND FRONT-LINE STAFF)

All of the projects reviewed had a coordinator role, be it a designated project coordinator or someone who had taken on the role of training and organizing the peer researchers. The coordinator was usually located in the partnering community agency (the coordinator might be existing staff or hired on for the life of the project), and was responsible for providing supervision and support to peer researchers:

I know that, one of my biggest challenges was supporting [the] women throughout the process, we spent a lot of time, two hours before a meeting finding people, bringing them, sitting with them for two hours so that they would be able to be at the meeting, so, and I think that was import-

ant, because it got people to be there, and it also allowed the women to feel as if they were part of something, and they talked about the fact that, that was important. (Service Provider)

While the above quote provides a rich example of the kind of time and skills needed to organize peer researchers with complex needs, the coordinator role did not always allow for this. In some cases, the coordinator role was seen more as an administrative function (e.g., sending out peer researchers on research assignments) that provided ad hoc supervision.

In many ways, the coordinator role emerged as the most demanding in the project and was central to its success. The coordinator required a combination of "hard and soft" skills and competencies:

- an understanding of the research process and the needs of the research team
- the ability to work in a community setting
- the ability to provide support and supervision, often to individuals with complex needs
- the ability to balance multiple (and sometimes competing) stakeholder needs

Balancing the project's needs (budget and time constraints) with peer researchers' needs (support and socializing) can be very challenging for coordinators:

They never gave us a chance to talk about our experiences amongst each other and everybody. So, we'd get back together, and they would try and teach us something new and everybody's, like "Blah, blah, blah, blah." So, like, nothing would ever get done … So, but they learned that, and we brought that up to them. And so, I think we are meeting again in a few weeks. And, part of half a day is just saying hello … talking about our experiences of, you know, of this part of the study and any problems that came up. (Peer Researcher)

As the above example illustrates, when adequate time is not given to achieve the needed balance between personal and research needs, it may prove difficult for the project to move forward.

PEER RESEARCHERS

The peer researchers we heard from talked about the importance of the support they received, but also how

they tried to support others in the project and beyond:

> [A]ll we did really is we supported others who need-ed it at that time. We supported each other. We supported participants ... we'd come into these meetings and the other people working on that project would also provide that same positive support to, say, get us out of that particular mood that we were just coming out of, or some kind of event that just occurred, and, you know, helping us leave that behind and focus on this project which for us was very fun, rewarding, fulfilling. (Peer Researcher)

We heard from both peer researchers and research teams that one of the best ways peer researchers could support each other was through partnered data collection. This could simply entail attending a field site together (but possibly collecting data separately) or actual partnered data collection (a co-facilitated focus group):

> Part of my plan is to have the two peer interview-ers always go to agencies and interview locations so they're a support team, so if they have a heavy session there's actually an opportunity to debrief with your co-worker, and if there's something that kind of frightens them, you know cuz they can be interviewing people that they are physically fright-ened of as well, like that could be happening, so I'm trying to plan for all of those things based on other projects I've done. (Service Provider)

In addition, many peer researchers experienced inter-nal conflict between their status as researcher and com-munity member when in the field. Many found it helpful to bounce ideas off their peers who were experiencing similar insider/outsider tensions.

As primary data collectors, many peer researchers found themselves providing support to community part-ners during what were sometimes emotionally charged data collection sessions:

> [A]s I said before, you know sometimes emotions can be very high. Especially, you know some of those people they come together for the first time, and they have different opinions, and also some of them, it's because of their mental state. You say some-

thing and they think you are really talking about them, you know. Other people say something and they feel really angry. (Peer Researcher)

> [T]hen she walked out of the group, stormed out, and we didn't know whether we should proceed or what. (Peer Researcher)

Although the peer researchers we heard from talked about community members' willingness to share their experiences in a very candid way (a benefit of the peer-peer model), many of these participants also would have benefited from support following these sessions.

Conflict and Mediation

Inevitably, disagreements over roles and responsibil-ities surfaced in the projects we studied. These disagree-ments often brought into question what constitutes appropriate supervision and adequate support:

> Which is exactly why you have to designate X amount of time for process when you're doing one of these projects, especially when they're going over such a length of time, when you can have personal conflicts that develop unchecked and can sabotage the entire project. (Service Provider)

> We haven't been without our growing pains. [Exter-nal researcher] has actually been involved as a medi-ator. We went through group counselling.(Peer Researcher)

Conflict can slow down a group's progress, but it is also an opportunity to improve group dynamics. Prop-erly processing such experiences and moving forward may create stronger research teams with long-term sus-tainability.

Conclusions

We have highlighted a number of key issues in recruiting, engaging, supporting, and supervising peer researchers. They represent important aspects of research, employ-ment, counselling, and community development. While the task of taking on a peer research model may seem daunting, the process was identified as rewarding by all of our participants. The issues we have identified can-

not be said to represent a comprehensive account of the issues that may emerge in peer research initiatives, but they provide a starting point for reflection and planning.

Recomendations

We encourage community-based research teams to:

1. Imagine the Peer Research Position

• Outline the peer researcher role in advance, and to create a Terms of Reference document to plan for how conflicts will be handled.

2. Develop Recruitment Strategies and Hiring Processes

• Recruit diverse peer researchers through both formal and informal networks.

• work with peers, academic partners, and other stakeholders to create recruitment procedures that help ensure the peer researchers hired have experience with the topic (especially when it is of a sensitive nature).

3. Establish "Contracts"

• Outline in writing what is required of the peer and the employer as a mutual safeguard.

• Consider both hierarchical (business model) and holistic (talking circles) options to address conflict, depending on the nature of the group.

4. Consider - Wages, Honorariums, and Financial Considerations

• Solicit peer input to establish the financial safeguards they need to participate.

5. Provide Training

• Develop and implement training programs that reflect the requirements of the procedures peers will undertake, integrate peer interests, and provide additional training as necessary.

6. Offer Support and Supervision

• Offer support and supervision and develop funding proposals that will accommodate the flexibility needed for community-based research.

• Hire, or delegate to, a coordinator with adequate training and experience to effectively supervise and support community members (this role will be different for every project, and must be defined early on through an in-depth discussion). The coordinator should have the autonomy and authority to make changes to timelines and schedules, and to balance the time needed for support and supervision.

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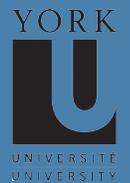
Peer Research in Action II: Management, Support, and Supervision

Peer research has emerged as a popular form of community-based research (CBR) where research projects include members of the target population who are trained to participate as co-researchers. The inclusion of community members in CBR through peer research initiatives is thought to enhance the quality of the data collected, allow for the expertise of lived experience to be incorporated over time, while promoting capacity building at the local level.

In Part II of our series Peer Research in Action, we explore the specific management, support and supervision needs and practices for peer researchers. This includes: approaches to recruitment, hiring processes, contracts, wages, honorariums and financial considerations, training, and support and supervision issues.

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