MANUAL FOR PEER EXCHANGE PROGRAM

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In collaboration

With SOPHIA Steering Committee

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1.1 Overview

The Society of Practitioners of Health Impact Assessment (SOPHIA) offers a range of opportunities for its members to learn from one another, including a mentoring program, networking events at conferences and meetings, and an online member directory. As part of its efforts to foster connections between all its members, SOPHIA is piloting a peer exchange program. While SOPHIA will develop the curriculum and facilitate the exchange, the program will be self-funded.

1.2 Goals

The goals of this peer exchange program are to:
1) promote professional development of health impact assessment (HIA) practitioners,
2) foster relationships among HIA practitioners that can be sustained in the future, and
3) identify areas of opportunity for collaboration between HIA organizations in the future.

1.3 Why Would I Want to be Involved in a Peer Exchange?

As a participant: Peer exchanges enable individuals' leadership potential to flourish and contribute to developing role models, best practices and networks for collaboration and skill sharing. Participants of peer exchanges have the opportunity for professional development that lead to higher quality HIAs, for developing connections that lead to expanded networks, and to identify areas for potential collaboration in the future.

As a host: Set your organization apart from others. Sites that host participants in peer exchanges can expect to strengthen partnerships and collaborations between HIA organizations, contribute to building an ecosystem of support, and deepen the impact of their existing or future HIAs.

1.4 Detailed Description

This program is designed for HIA practitioners who are interested in building or enhancing their HIA competencies by participating in hands-on experience with one of the HIA champion organizations. The peer exchange works like this: a health impact assessment (HIA) practitioner would visit a host site that is engaged in the HIA efforts and work under the guidance of the

host site's peer exchange liaison for approximately five to seven days on site, with additional dates pre- or post-exchange via tele-commute or email as needed. The HIA practitioner will participate in the selected HIA activities, especially ones that stretches the practitioner's current knowledge and experience. Objectives and timelines will be determined through a collaborative process between the HIA practitioner and the liaison at the host site, with SOPHIA providing guidance documents. See the menu of services for potential areas of focus on Page 7.

The exchange will be designed with opportunity for both the HIA practitioner and the host site to benefit from one another. The process for becoming a Peer Exchange Program Participant is described in Figures 1 and 2. The application is located in Appendix A, Page 17.

Figure 1. Process for Becoming Peer Exchange Program Participant

Figure 2. Detailed Steps: Enrolling in Peer Exchange Program

Getting Ready (Participant)
- Review Peer Exchange Documents located at http://sophia.wildapricot.org/Peer Exchange-Program
- Contact the Peer Exchange Program Coordinator to learn more about the program

Application (Participant)
- Complete and submit the application (template is located - Appendix A)
- Review a list of host sites and select up to 3 desirable locations
- Select core competencies from the menu of service

Review and Process Application (Program Coordinator)
- Review the application and match the program partipant with the host site

Host Site
- Receive, review and respond to the request/application
- Participate in a phone call with the Program Coordinator and participant

Getting Ready (Participant)
- Make travel arrangements
- Finalize the Individual Exchange Plan and travel itinerary in collaboration with the host site

Program
- Complete activities listed in the individual plan

1.5. Funding

The program is self-funded. The participants will be responsible for covering their expenses associated with lodging, travel (fights, transportation), meals and incidentals. However, some host sites might be able to assist participants in decreasing their expenses, for example, by offering the program participant to live with a host family. SOPHIA will continue to explore the opportunities for funding this program in the future.

1.6. Peer –Exchange Program Intersection with Other SOPHIA Services

SOPHIA is committed to supporting its members by providing various technical assistance and mentoring services. Peer Exchange Program is one of SOPHIA's services aimed at helping its members to build their HIA capacity. SOPHIA also offers a mentoring program that supports professional development and peer learning. SOPHIA mentors work by phone and email and can provide approximately two hours per month of support to mentees to enhance their HIA capacity. The list of mentors is available at http://sophia.wildapricot.org/Peer-Exchange-Program. To access this list, please login as a member.

1.7. Becoming a Host Site

This section outlines the process of how to become a host site.

Step 1- complete the host site application to become a host site located in Appendix B, Page 20.
Step 2 – receive a confirmation from the SOPHIA Peer Exchange Program coordinator.

1.8   Matching With a Host Site

This section outlines the process of how a participant can find a host site to visit.

Step 1- complete the program participant application
Step 2 – receive a confirmation from the SOPHIA Peer Exchange Program coordinator
Step 3 – review and agree on the host site agenda/individual plan
Step 4 – make travel plans

1.9   Lodging

As this program is self-funded, participants will be expected to ensure their own lodging during their peer exchange program. However, some host sites might be able to offer the program participant to live with a host family. Each program participant will identify their lodging preference in the application. During the matching process, SOPHIA will reach out to the participant and provide the name and contact information of the peer exchange liaison at the host site.

SECTION 2

The program curriculum includes a variety of services ranging from those that aim to build practitioner capacity in the HIA steps and methods to those which are aimed at building relationships with other HIA practitioners. In their application, participants will be asked to review a "menu of services" and select areas of interest. Next, we will work with the interested host site to identify which of these services it will be able to provide during the exchange program.

Below is a list of areas/services that might be offered to the program participants (Figure 3, Page 7). Each participant will be asked to place an X next to activities/areas that they would like to participate in or build capacity in during the exchange program.

Figure 3. Menu of Services

Competencies	Services	Description
Leadership Project Management	☐ Leadership and project management duties	Learn about project management approaches and tools for HIA projects. Develop templates/system for managing HIAs.
Budgeting	☐ Financing and budgeting	Work with the host site team to understand how to budget/allocate time/resources for HIAs. The activities could also include a development of budgeting templates and protocols.
Working with others	☐ Building an HIA team	Learn how to identify and recruit partners for conducting an HIA (e.g., academia, state agencies, community organizations).
Community engagement practices Integrating equity into HIA	☐ Interactions with community members/stakeholders	Participate in the community/stakeholder meetings with the host site project team. Learn how to: - identify and invite a diverse group of participants - develop appropriate documents - facilitate meetings The participants might be offered an opportunity to lead part of the meeting and/or develop materials.

Competencies	Services	Description
Effective work with decisions-makers Integrating an HIA into a policy change	☐ Interactions with elected officials/decision makers	Build capacity in engaging policymakers and legislators around HIAs , receive guidance on building trusted relationships, utilizing evidence-based information and policy tools and unbiased way, learn how to incorporate a "health in all policies" concept into discussions. The participants might also attend meetings with local/state elected officials, and meet on- on-one with elected officials to discuss HIA.

HIA tool and/or specific HIA steps	☐ How the HIA tool works
	
	☐ Deep dive into specific HIA steps
	    ☐ Screening
	    ☐ Scoping
	    ☐ Assessment
	    ☐ Recommendations
	    ☐ Reporting
	    ☐ Evaluation/ Monitoring
		Review HIA steps and work through case studies/your own project to operationalize each step.
		
		The "deep dive" into specific steps could include the following activities: build a pathway diagram, identify assessment methods, create recommendations and/or monitoring plan.

Marketing Communications	☐ Communications – development of HIA communications plans including working with media, stakeholder engagement, and more	Understand the basic requirements of a communications plan related to a public health project or program, including: - Develop skills to respond orally and in writing to media inquiries, learn techniques to work with the media to promote health impact assessments - Tactics to promote your HIA on your website, in social media, marketing materials and other avenues

Competencies	Services	Description
		- Learn how to develop marketing materials and professional documents with concise messaging and appeal.
HIA Technical Assistance expert	☐ Becoming an HIA TA provider	Discuss how to gain community interest in building HIA capacity. Become familiar with: - Strategies for marketing HIA trainings - HIA training curriculum - TA delivery approaches
Subject/area specific expertise	☐ Deep dive into specific topic areas ☐ Built Environment ☐ Transportation ☐ Education ☐ Natural Resources ☐ Climate Change ☐ Food and Agriculture ☐ Labor and Employment ☐ Economic Policy ☐ Environment ☐ Criminal Justice issues ☐ Other_____	Learn about how to conduct HIAs on policies/projects in various sectors.
HIAs in a different context	☐ Learn how to conduct HIAs in different settings/context ☐ Local ☐ State ☐ Federal ☐ Internationally ☐ Other_____	

Competencies	Services	Description
Types of HIAs	☐ Learn how to conduct different types of HIAs ☐ Equity HIAs ☐ Mental Wellbeing HIA ☐ Rapid HIAs ☐ Other_____	

☐ Other

SOPHIA Health Impact Assessment Exchange Program
Program Objectives and Timeline

The Peer Exchange Program participants are encouraged to complete the Individual Exchange Plan (IEP) in collaboration with their host site before staring the program. The plan is intended to be a living document and can be modified during the program.

Name and Organization	
First and Last Name of the Program Participant	
Job title	

Program Objectives Please list at least two companies and objectives you would like to work on to increase your knowledge and capacity during your exchange.	Planned project deliverables List the outcomes that you plan to achieve during the time spent at host site. This can include documents, presentations, or progress towards a goal, etc.
Example: Technical Assistance Expert [Competency] • Learn about effective TA approaches [List specific objectives here] • Understanding common challenges with providing TA [List specific objectives here]	- A summary document that describes approaches and pro and cons of each approach [List deliverables that are linked to objectives here.]
1. [List first competency here]	- [List deliverables that are linked to objectives here.]
2. [List second competency here] - [List specific objectives here]	- [List deliverables that are linked to objectives here.]

| Program Objectives

Please list at least two companies and objectives you would like to work on to increase your knowledge and capacity during your exchange. | Planned project deliverables

List the outcomes that you plan to achieve during the time spent at host site. This can include documents, presentations, or progress towards a goal, etc. |
|---|---|
| | |
| 3. [List third competency here]
  - [List specific objectives here] | - [List deliverables that are linked to objectives here] |

Program timeline

Please list major program activities and expected timeline – plan between 5 to 7 business days of work on exchange projects. This is a tentative plan, changes in timeline may occur.

Activity Description (please list activities here)	Date(s) planned	Objectives

EXCHANGE PROGRAM PLAN APPROVAL
Please indicate by signing your name electronically that you have read, understand, and agree with the objectives and timeline outlined in the agreement above and will work to complete and/or support completion.

Note: Although SOPHIA will make every effort to ensure that the host site offers a quality experience to an exchange participant, it cannot guarantee or be liable for any cause whatsoever that may arise out of or in connection with the services of this HIA Exchange Program. In addition, by engaging in this exchange program, you agree to hold harmless the SOPHIA organization, its directors, officers, employees, agents, volunteers, assigns, and successors (hereinafter, "the protected parties") from all liability from any cause whatsoever.

1. Exchange Participant:
2. Host Site Representative:

4.1   How to Match With a Participant

This section describes the process a host site should expect to follow from applying to be a host site to wrapping up a participant's peer exchange.

Step 1- complete an application to be a peer exchange host site: (Appendix B, Page 20).

The application will include:
- the contact information for the site liaison
- information about current and upcoming HIAs that they would be a good learning opportunity for peer exchange participants
- the services that they will be able to provide to a participant (selected from the menu of services listed)

Step 2- SOPHIA will contact the host site with an acknowledgment that the application was received and details of what to expect next.

Step 3- SOPHIA will contact the host site when with potential matches.

Step 4- SOPHIA will reach out to potential participants to coordinate goals/objectives, timeline, and logistics.

Step 5- Prepare for the participant, including details about the exchange program itinerary.

Step 6- Complete the exchange

Step 7- Wrap-up the exchange

4.2   Sample Agenda

Each host site will draft a program agenda in collaboration with the program participant. The "sample agenda" below is intended to provide a high-level example.

Day 1:
- Liaison will meet with participant to verify goals/objectives, introduce HIA or project and identify exchange deliverables
- Short informational conversations with key staff

Day 2:
- Participate in community engagement activity

Day 3:
- Help to analyze qualitative data in the context of the HIA scoping step

Day 4:
- Attend a county commission meeting with host representatives

Day 5:
- Wrap up exchange deliverables
- Meet with liaison to determine if and how objectives and goals were met
- Participant to provide feedback/recommendations for host site
- Host site to provide feedback/recommendations of participant

SOPHIA is responsible for overseeing and administering the HIA Exchange Program. Specifically, SOPHIA will identify and recruit host sites, market this program to HIA practitioners, connect interested participants with host sites, and share stories of practitioners and host sites who participated in the HIA Exchange Program. SOPHIA will also provide program materials, including the program description, list of host sites, and *Peer Exchange Manual* (this document) on its website at: (add link here).

The Peer Exchange Program contact is: Tatiana Lin at tlin@khi.org

Liability: Although SOPHIA will make every effort to ensure that the host site offers a quality experience to an exchange participant, it cannot guarantee or be liable for any cause whatsoever that may arise out of or in connection with the services of this HIA Exchange Program. In addition, by engaging in this exchange program, you agree to hold harmless the SOPHIA organization, its directors, officers, employees, agents, volunteers, assigns, and successors (hereinafter, "the protected parties") from all liability from any cause whatsoever.

APPENDIX A. HIA PEER EXCHANGE PROGRAM: PROGRAM PARTICIPANT

HIA PEER EXCHNAGE PROGRAM: PROGRAM PARTICIPANT	
First and Last Name of the Participant	
Address (street, city and zip code)	
Country	
Email	
Phone	
Languages spoken	☐ English ☐ French ☐ Other_____ ☐ Spanish ☐ German
EXPERIENCE	
How many years have you been working in the HIA field?	☐ less than 1 ☐ 1 – 2 ☐ 3-5 ☐ 6 – 10 ☐ 11 or more
What type of HIA work have you been engaged in? *Check all that apply.*	☐ Conduct HIAs ☐ Teach HIA courses ☐ Conduct HIA trainings ☐ Provide HIA TA/mentoring ☐ Other_____
How many HIAs have you completed?	☐ None ☐ 1 – 2 ☐ 3-5 ☐ 6 or more
What were the subjects of your HIAs? *Check all that apply.*	☐ Built Environment ☐ Food and Agriculture ☐ Transportation ☐ Labor and Employment ☐ Education ☐ Economic Policy ☐ Natural Resources ☐ Environment ☐ Climate Change ☐ Criminal Justice issues ☐ Other_____ ☐ N/A
At which level did you conduct an HIA(s)?	☐ Local ☐ State ☐ Federal ☐ N/A

Have you conducted an HIA(s) outside of the United States?	☐ No ☐ Yes (list countries)_____ ☐ N/A
EXCHANGE PROGRAM	
Reasons for participating in the Peer Exchange Program. Why are you interested? (please describe)	
Where would you like to travel for your exchange program?	☐ Locally ☐ State ☐ Federal ☐ Internationally
When would you like to participate in the program? If you know a specific month, please list it in the next column.	☐ Summer ☐ Fall ☐ Winter ☐ Spring _____

Which of these services are you interested in receiving or building capacity in during the exchange program?
 	
Check all that apply.
	☐ Leadership and project management duties
	☐ Financing and budgeting
	☐ Building an HIA team
	☐ Interactions with community members/stakeholders
	☐ Interactions with elected officials/decision makers
	☐ How the HIA tool works
	☐ Deep dive into specific HIA steps
	    ☐ Screening
	    ☐ Scoping
	    ☐ Assessment
	    ☐ Recommendations
	    ☐ Reporting
	    ☐ Evaluation/ Monitoring
	☐ Communications – development of HIA communications plans including working with media, stakeholder engagement, and more
	☐ Becoming an HIA TA provider
	☐ Deep dive into specific HIA topic areas
	☐ Learn how to conduct HIAs in different settings/context
	☐ Learn how to conduct different types of HIAs

How long would you like your program to last?	☐ 1-2 days ☐ 3-4 days ☐ 5-7 days ☐ 8-10 days

In what setting would you like to be during the exchange program? *Check all that apply.*	☐ in office (learning and activities will happen in the office-based setting) ☐ in the field (learning and activities will happen outside of the office) ☐ hybrid (learning and activities will be conducted in the office-based setting and in the field)
What accommodations would you like to be offered by the organization? *Check all that apply.*	☐ separate office ☐ computer ☐ meals ☐ desk ☐ transportation ☐ mentor
What types of after-work activities would you be interested in participating with the host site staff?	☐ Dinner at a local restaurant ☐ Visiting local attractions ☐ Outdoor recreation ☐ Other_____
The host site might offer the program participant to stay with a "host" family while visiting the site. Would you be interested in staying with a "host" family?	☐ No ☐ Maybe ☐ Yes
Do you have any special requirements including dietary restrictions or preferences?	
What else would you like the host organization to know about you?	

APPENDIX B. HIA PEER EXCHANGE PROGRAM: HOST SITE

HIA PEER EXCHANGE PROGRAM: HOST SITE	
INFORMATION ABOUT ORGANIZATION	
Organization name	
Name (first and last) of the site liason	
Address	
Country	
Email	
Phone	
Number of employees at the organization	
Your organization's official language(s)	☐ English ☐ French ☐ Other_____ ☐ Spanish ☐ German
Reasons for Serving a Host Site (please describe)	
EXPERIENCE	
How many years has your organization been working in the HIA field?	☐ 1 – 2 ☐ 3-5 ☐ 6 – 10 ☐ 11 or more
What type of HIA work does your organization engage in? *Check all that apply.*	☐ Conduct HIAs ☐ Teach HIA courses ☐ Conduct HIA trainings ☐ Provide HIA TA/mentoring
How many HIAs has your organization completed?	☐ 1 – 2 ☐ 3-5 ☐ 6 or more
What were the subjects of your HIAs? *Check all that apply.*	☐ Built Environment ☐ Food and Agriculture ☐ Transportation ☐ Labor and Employment ☐ Education ☐ Economic Policy ☐ Natural Resources ☐ Environment ☐ Climate Change ☐ Criminal Justice issues ☐ Other_____

At which level did you conduct an HIA(s)?	☐ Local ☐ State ☐ Federal
Have you conducted an HIA(s) outside of the United States?	☐ No ☐ Yes (list countries)_____
Is there an online report(s) available for your HIA(s)? If so, please include the link here.	
Is there a dedicated Web site for your HIA (see http://www.prop47impacts.org/ for an example)? If so, please include the URL here.	
CURRENT HIA WORK	
Are you currently working on an HIA or any HIA-related activities?	☐ Yes ☐ No
If yes, please describe your HIA here:	Topic _____ ☐ Local ☐ State ☐ Federal Start date: Click here to enter a date. End date: Click here to enter a date.
HOST SITE	
How often would your organization able to host program participants?	☐ one time a year ☐ 2-3 times a year ☐ 4-5 times a year ☐ 6 times a year or more
How many days would your organization be able to host an HIA practitioner?	☐ 1-2 days ☐ 3-4 days ☐ 5-7 days ☐ 8-10 days

Which of these services your organization would be able to offer the program participant?
 	
Check all that apply.
	☐ Leadership and project management duties
	☐ Financing and budgeting
	☐ Building an HIA team
	☐ Interactions with community members/stakeholders
	☐ Interactions with elected officials/decision makers
	☐ How the HIA tool works
	☐ Deep dive into specific HIA steps
	     ☐ Screening
	     ☐ Scoping

	☐ Assessment ☐ Recommendations ☐ Reporting ☐ Evaluation/ Monitoring ☐ Communications – development of HIA communications plans including working with media, stakeholder engagement, and more ☐ Becoming an HIA TA provider ☐ Deep dive into specific HIA topic areas ☐ Learn how to conduct HIAs in different settings/context ☐ Learn how to conduct different types of HIAs
What type of experience would your organization be able to offer a program participant? *Check all that apply.*	☐ in office (learning and activities will happen in the office-based setting) ☐ in the field (learning and activities will happen outside of the office) ☐ hybrid (learning and activities will be conducted in the office-based setting and in the field)
What accommodations would your organization be able to offer to a participant? *Check all that apply.*	☐ separate office ☐ computer ☐ meals ☐ desk ☐ transportation ☐ mentor
What types of after-work activities would your staff be willing to participate in with the program participant?	☐ Dinner at a local restaurant ☐ Visiting local attractions ☐ Outdoor recreation ☐ Other_____
Would any of your staff be willing to allow a participant to stay in their home place for the duration of the program?	☐ No ☐ Maybe ☐ Yes
What else would you like a program participant to know about your organization?	

APPENDIX C. Description of Potential Host Sites (Pending)

This section will include a list of all the potential host sites (based on responses received from the interest survey and insider knowledge of possible hosts). The list will include the name, location, and mission statement of each organization, along with a list of HIAs they are or may be working on in the future.

APPENDIX D. List of HIA-Related Events (Pending)

This section will include a list of all the HIA-related events for the foreseeable future so that potential participants can better plan "piggy-backing" a peer exchange with a trip they may already be going on.

APPENDIX E. Map of Potential Host Sites (Pending)

We could also create a map of all potential host sites so that participants could easily match the list of HIA-related events with potential sites near the event in order to better plan "piggy-backing" a peer exchange with a trip they may already be going on.