Included templates:

* Informational interview script template
* Informational interview sign-up sheet
* Stakeholder matrix facilitation guide template
* Topic group planning templates

**TOOL INSTRUCTIONS:** Please modify this tool to fit the goals of your project. Where noted, fill in the specific health topic of focus and details about the Community Research Team. We also recommend adapting the interview questions used in this guide to best suit your needs.

**Purpose of interview:**

The purpose of conducting these informational interviews is to get a sense of where to find potential stakeholders to recruit for participation in the SEED Topic groups and to identify subgroups of people at risk of or affected by [health topic]. Topic group members will undergo a series of facilitated exercises to develop and prioritize research questions related to [health topic].

**Participants:**

People in local organizations who can provide information about the health topic, population at risk, and the services the organization provides will be interviewed by members of the Community Research Team.

**Interview instructions:**

As a group, you will identify service providers and organizations in the community that you are familiar with that serve people with [health topic]. On your own, please contact your assigned person/organization to schedule a brief informational interview to be conducted over the phone or in person. This interview should last no more than 30 minutes.

**Please follow the attached interview script, and make sure to take thorough notes throughout the interview.** It is best to take notes during the interview, rather than wait until after the interview is finished.

|  |  |
| --- | --- |
| **Interview Information** | |
| **Name of Interviewer (Community Research Team Member):** |  |
| **Organization name:** |  |
| **Name of person being interviewed:** |  |
| **Interview Focus (circle one)** | **[health topic 1] [health topic 2]** |
| **Date of interview:** |  |
| **Interview START time:** |  |
| **Interview END time:** |  |

**Introduction:**

“Thank you for taking the time to speak with me today. My name is [name] and I’m a member of [Community Research team name], a [mission of Community Research team]. Currently, we are working on a project that seeks to develop research questions surrounding [health topic]. I’m interested in knowing more about your organization and the people it serves, in order to get a better sense of who is affected by these health conditions, and the resources available to them.”

**Interview Questions:**

IQ1: “**Among the people your organization serves, who is most affected by [health topic]?**”

Probe: “**Do you see important differences by age, sex, race-ethnicity,**

**socioeconomic status, place, health status, or something else?”**

IQ1a: **“Which groups are most at risk? Are there any sub-populations**

**particularly at risk for getting the disease?”**

IQ1b: “**Are there any sub-populations particularly at risk for poor outcomes?”**

IQ2: “**What types of support or information do patients receive from your**

**organization for [health topic]?”**

IQ3: “**Where else do patients receive support or services?”**

IQ4: “**What types of local advocacy organizations exist?**”

IQ5: “**Are there other local leaders/policymakers/etc. involved in this issue?”**

|  |  |
| --- | --- |
| Research Team Member | Organization (Name of interviewee) |
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The research team completes a set of Stakeholder Identification Matrices to develop a comprehensive sampling plan for stakeholder engagement. The matrices are designed to be adaptable to different types of projects by customizing each template based on the study population and topic. This step may be used to select Topic group participants and/or SCAN participants.

The matrices include:

* A detailed *Matrix 1:* *Patient Stakeholder Identification matrix*, which identifies potential patients/caregiver subgroups by demographic, social, and health-related characteristics. To complete this matrix, the team used preliminary data to rank subgroups based on a variety of criteria to determine which subgroups are most relevant to include as stakeholders for the particular topic and geographic area being studied.
* *Matrix 2:* *Service Provider and Other Stakeholder Identification matrix*, which identifies subgroups of health care professionals in clinical, ancillary, and non-clinical settings, and other stakeholder such as payers, policymakers, and researchers.
* *Matrix 3: Stakeholder recruitment matrix*, which identifies specific places to recruit each patient, health care professional, and other stakeholder subgroup by source type (e.g., clinics, community organizations, churches, support groups, etc.).

The set of matrices can be found in the excel file ‘*Stakeholder Matrices\_templates’*.

**Matrix 1: Patient Stakeholder Identification Facilitation Guide**

**Purpose:** This matrix will be used to identify patient stakeholder participants by demographic, social, and other health-related criteria. This step may be used to select Topic group participants and/or SCAN participants.

**What you will need:**

* *Matrix 1: Patient Stakeholder Identification* (projected)
* *Demographics Information* handout
* Information from Informational Interviews conducted by Research Team members
* Flip charts/white board
* Markers
* Pens (1 per person)
* Sticky notes or index cards (voting)
* Rank cards (1 pack per person; each pack contains three notecards with the following written: ‘Low’, ‘Medium’, ‘High’ (one word per card)

**Instructions and Facilitation Questions (FQ):**

Before starting this step, the research team should decide the number of Topic groups to recruit for this project. The number of groups selected may be influenced by factors such as the diversity of the target population, available time and resources, and goals of the project. Similarly, if this step will be used to select SCAN participants, it will be useful to decide beforehand how many focus groups and interviews will be conducted.

**Introduction:**

There are many ways in which stakeholders, patients, and caregivers impacted by [health condition] can be involved in this project. There are three different participant groups, and each type of participation has a different role.

**Topic groups:** This is the most involved group of stakeholders we will be working with throughout the project. They will be involved in all Topic group meetings, and will talk at length about their experience with [health condition]. Each Topic group will develop a conceptual model diagraming the factors that influence the health outcome based on their own experience, and will create research questions that are important to them. It’s important to remember that each Topic group will bring their own unique perspective of the health topic to the table, and both their conceptual models and research questions will reflect this unique perspective and experience. Therefore we want to consider who would be the best people to serve in this role throughout the project.

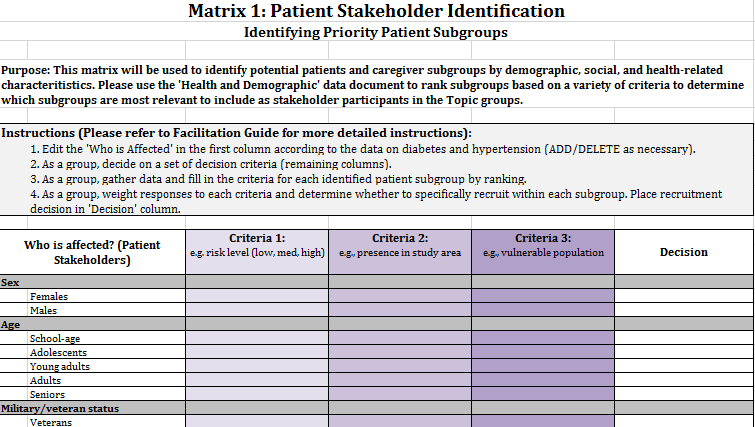
Today we will work through an activity to help us determine who we’d like to be a part of the Topic groups in this project. Patients, caregivers, providers and other stakeholders can also be involved in this project as SCAN participants:

**Focus groups:** Focus groups are interactive group meetings that allow participants to share their experiences, perceptions, and opinions about our health topic. People involved in this type of participant group will be involved in a one-time only focus group lasting approximately 90 minutes. This is a great way for people to participate who may not be able to commit to a more involved, long-term commitment like the Topic groups.

**Key informant interviews:** One-on-one interviews, lasting between 30 and 60 minutes, will be conducted over the phone or face-to-face. This allows us to include people in our study that might not be able to meet for longer periods of times (Topic groups) or are not able to attend a focus group. Rather, this allows us to include people who have busy schedules or who might prefer to meet privately (i.e., health care providers (MDs), policymakers, etc.).

**Step 1: Choosing patient sub-groups:**

**Purpose:** This step will help the research team brainstorm different patient sub-groups affected by the health topic. There is flexibility in choosing which patient categories and subgroups to use (far left-hand side of the matrix) – add/delete categories as necessary.



**Brainstorm activity:** Begin this brainstorm without looking at or projecting the matrix. Facilitator should lead the Research Team in an activity to identify all potential patient groups that should be involved in the project. Facilitator prompts discussion through the following questions and writes down all groups identified on a board or flip-chart. After completing brainstorming, edit the categories in the matrix document and project the final matrix for the group to see.

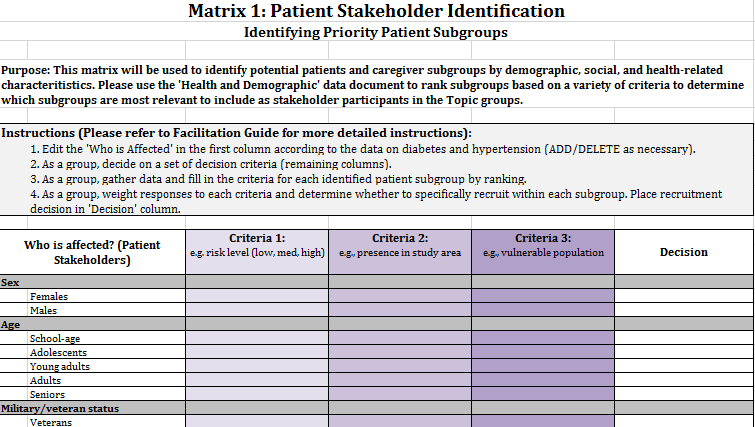
***FQ 1: “Who is affected by [health condition]?”*** [without looking at matrix – facilitator writes list on board]

* ***“What did we discover about who is affected by [health condition] from the demographics information handout?”***
* ***“In our informational interviews, what were some of the local organizations and resources we learned about? What people/patients do they serve? Do they target any specific groups of people?”***
* ***“Which patients in this community are at high risk? Are there certain people at risk because of the type of work they do? Because of age, gender, behavior, other medical conditions, etc?”***
* ***“Which patients in this community have trouble accessing care or services?”***
* ***“Which patients in this community might provide a unique perspective?”***

**Edit the matrix:** After completing brainstorming, edit the categories in the matrix (rows on left).

**Step 2: Choosing decision criteria:**

**Purpose:** To help reduce the size of the initial brainstormed list of patient subgroups, the research team will decide upon which groups of patients should be prioritized and included as participants in Topic groups. This will be accomplished by having them decide upon a set of decision criteria. These criteria will be used to rank each patient subgroup, and should be filled in across the top (columns) of Matrix 1.



**Choosing decision criteria:** Prompt a discussion on potential decision criteria using the following question. Write all of the recommended criteria on a board or flip chart.

***FQ1: “How should we decide which groups of patients we want to include as part of our patient Topic groups?”***

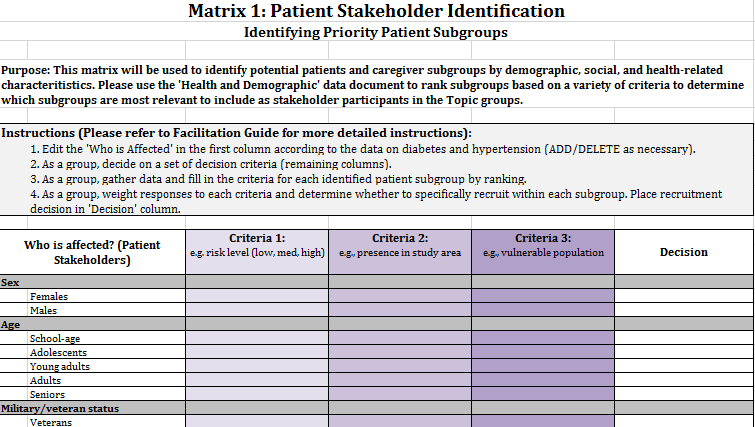
* ***“What are some decision criteria we should use?”***
  + ***“Is prevalence of this disease (how common it is) in a particular group important?”***
  + ***“Is the presence of this group in our community important?”***
  + ***“Should we specifically prioritize vulnerable groups of people?”***
  + ***“What about a groups risk level – risk of complications, death, poor health outcomes?”***
  + ***“Any other decision criteria?”***

**Voting:** Have the group vote on the top three criteria they want to use. This can be done by passing out notecards (three cards per person) and having Research Team members write ONE criteria per notecard. Pass notecards to facilitator to count. The three criteria with the most votes will be used in the next step.

**Edit matrix:** After completing criteria selection, edit the categories (columns) in the matrix with the top three criteria.

**Step 3: Ranking each patient subgroup according to criteria:**

**Purpose:** Rank each patient subgroup according to the decision criteria decided on in the last step.



**Ranking process:** Each person will get a set of rank cards (Low, Medium, High) to use for ranking each patient subgroup on each of the three decision criteria. The project coordinator will have the research team indicate a rank (low, medium, high) for each decision criteria for each patient subgroup using the rank cards. The coordinator will count the number of votes for each ranking. The ranking with the greatest number of votes is converted to a number according to the following number system:

Low = 1 point

Medium = 2 points

High = 3 points

This number is recorded in the appropriate box in Matrix 1.

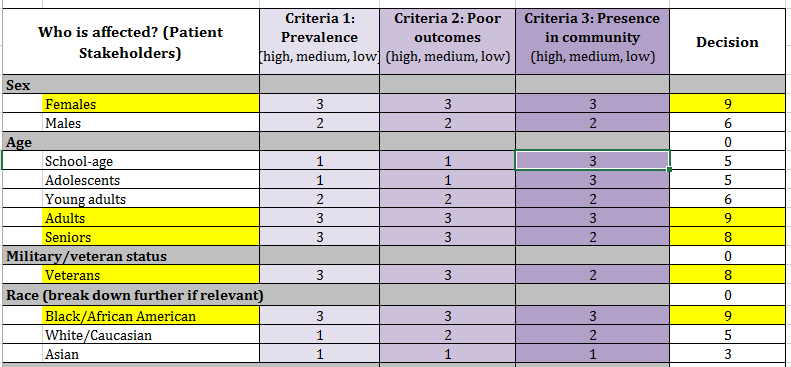
Facilitator:***“Now we are going to look at each of the patient subgroups we brainstormed and rank them based on the decision criteria we just set. For example, based on what we’ve learned so far in this project, for [SUBGROUP 1], do you think this group is low, medium, or high [DECISION CRITERIA 1] for having [health condition]? What about [DECISION CRITERIA 2] – do you think [SUBGROUP 1] is low, medium, or high?”*** (See below for example script from Richmond demonstration.)

[Richmond demonstration example: **“Now we are going to look at each of the patient subgroups we brainstormed and rank them based on the decision criteria we just set. Based on what we’ve learned so far in this project, do you think FEMALES have low, medium, or high rates (Criteria 1: PREVALENCE) of diabetes or hypertension?** (Group responds: High). ***“Okay, so diabetes and hypertension has a high PREVALENCE in FEMALES***.**”** [Notetaker/coordinator places “3” in corresponding box]. “Looking at our next decision criteria, do you think FEMALES have a low, medium, ***or high risk for having POOR OUTCOMES (Criteria 2) associated with diabetes and hypertension?”*** (Group responds: High). ***“Okay, so FEMALES have a HIGH risk of POOR OUTCOMES.”*** [Notetaker/coordinator places “3” in corresponding box.] ***“And lastly, how prevalent are females within our community (the East End of Richmond) – is there a low, medium, or high PRESENCE (Criteria 3: PRESENCE IN COMMUNITY) of FEMALES here?”*** (Group responds: High). **“Okay, so FEMALES have a HIGH PRESENCE within our community.”** (Notetaker/coordinator places “3” in corresponding box].

**Step 4: Weight responses, prioritization of patient subgroup and Final Decision:**

**Purpose:** Select patient subgroups that will be carried over for use in Matrix 3.

**Example: Completed Matrix 1**



**Subgroup selection:** Add up the three criteria rankings for each of the patient subgroups. Record this number in the ‘Decision’ column. (Can create an equation within excel to automatically populate this score.) The subgroups with scores of 8 points or more\* are carried over to the next step as prioritized patient subgroups for Topic groups. Highlight all groups that were carried-over in yellow.

\*This number can be adjusted and reduced if this eliminates too many patient subgroups

**MOVE ONTO MATRIX 2: SERVICE PROVIDER/OTHER STAKEHOLDER IDENTIFICATION**

**Matrix 2: Service Provider/Other Stakeholder Identification Facilitation Guide**

**Purpose:** This matrix will be used to identify all Health Care, Service provider and Policymaker stakeholders to participate as Topic group members.

**What you will need:**

* Matrix 2: Service Provider/Other Stakeholder Identification (projected)
* Information from Informational Interviews
* Sticky notes or index cards (voting)
* Flip charts/white board
* Markers
* Rank cards (1 pack per person; each pack contains three notecards with the following written: ‘Low’, ‘Medium’, ‘High’ (one word per card)

**Step 1: Choosing Service Provider/Other Stakeholder sub-groups:**

**Purpose:** This step is meant to help the research team brainstorm different service provider subgroups or other stakeholders involved with the health topic. There is flexibility in choosing which provider categories and subgroups to use (far left-hand side of the matrix) – add/delete categories as necessary.

**Brainstorm activity:** Begin this brainstorm without looking at or projecting the matrix. Facilitator should lead the Research Team in an activity to identify all potential provider groups that should be involved in the project. Facilitator prompts discussion through the following questions and writes down all groups identified on a board or flip-chart. After completing brainstorming, edit the categories in the matrix document and project the final matrix for the group to see.

***FQ 1: “Who is involved with [health condition]?”*** (without looking at matrix – facilitator writes list on board)

* ***“In our informational interviews, what were some of the local organizations and resources we learned about? What types of professionals are serving in these organizations?”***
* ***“What types of health care professionals serve people with [health condition]?”***
  + ***“What types of service providers are important for people with [health condition]? (e.g., social services, health education, etc.)”***
* ***“What other types of professionals may work in the area of [health condition]?” (research, policy, insurance, advocacy)***
* ***“What other type of stakeholder might bring a unique and important perspective about [health condition]?”***

**Edit the matrix:** After completing brainstorming, edit the categories in the matrix.

**Step 2: Choosing decision criteria:**

**Purpose:** To help reduce the size of the initial brainstormed list of service providers/other stakeholders, the research team will decide upon which groups of stakeholders should be prioritized and included as participants (either as Topic group members, Focus Group participants, or Key Informant Interviews). This will be accomplished by having them decide upon a set of decision criteria. These criteria will be used to rate each service provider subgroup, and should be filled in across the top (columns) of Matrix 1.

**Choosing decision criteria:** Prompt a discussion on potential decision criteria using the following question. Write all of the recommended criteria on a board or flip chart.

***FQ1: “How should we decide which groups of service providers/other stakeholders we want to include in this project?” (Topic groups, Focus groups, and Key Informant Interviews)***

* ***“What are some decision criteria we should use?”***
  + ***“Is the amount or type of professional experience, expertise, and knowledge important to consider?”***
  + ***“What about how much contact they have with patients with lung cancer?”***
  + ***“Ability to affect the services that patients receive?”***
  + ***“Ability to affect the policy environment?”***
  + ***“A unique perspective on [health condition] outcomes?”***
  + ***“Anything else?”***

**Step 3: Ranking each service provider subgroup according to criteria:**

**Purpose:** Rank each service provider/other stakeholder subgroup according to the decision criteria decided on in the last step.

**Ranking process:** Each person will get a set of rank cards (Low, Medium, High) to use for ranking each patient subgroup on each of the three decision criteria. The project coordinator will have the research team indicate a rank (low, medium, high) for each decision criteria for each patient subgroup using the rank cards. The coordinator will count the number of votes for each ranking. The ranking with the greatest number of votes is converted to a number according to the following number system:

Low = 1 point

Medium = 2 points

High = 3 points

This number is recorded in the appropriate box in Matrix 2.

**Step 4: Weight responses, prioritization of service provider subgroup and Final Decision:**

**Purpose:** Select service provider/other stakeholder subgroup that will be carried over to the next step as prioritized service provider/other stakeholder subgroup.

**Subgroup selection:** Add up the three criteria rankings for each service provider/other stakeholder subgroup. Place this number in the ‘Decision’ column. (Can create an equation within excel to automatically populate this score.) The subgroups with scores of 8 points or more\* will be carried over to the next step as prioritized service provider/other stakeholder subgroup for Topic groups. Highlight all groups that were carried-over in yellow.

\*This number can be adjusted and reduced if this eliminates too many subgroups

**NEXT STEP: CHOOSING COMPOSITION OF TOPIC GROUPS**

**Choosing composition of Topic Groups**

**What you’ll need:**

* Flip chart/whiteboard
* Markers
* Sticky notes or index cards (voting)

**Step 1: Choosing composition of Topic groups:**

**Purpose:** As part of this study, the research team is limited to having a certain number of different stakeholder Topic groups.

\*\*Throughout this process, the Research Coordinator/Group Facilitator should coach the group to not go so narrow that it makes finding participants difficult, but also not to rule out groups because of issues such as age, literacy, or how busy they are (e.g., MDs)\*\*

**Step 1a: Brainstorming Patient Stakeholder Topic Groups:**

[On a piece of paper (or projected), list out all the highlighted prioritized patient subgroups from Matrix 1.]

***FQ1: “Looking at our final list of patient subgroups (those that were retained with the highest scores), who should we include as participants in our TOPIC groups? It’s important to understand that each group of people will bring a unique perspective to this project that will be reflected in their conceptual models and research questions. This may be helpful in thinking about who we want to include in these patient groups, as well as the feasibility of engaging them throughout the project.”***

***“First let’s look at all of the groups and see if we should modify, clarify, or combine any of them:”***

* ***“Does it make sense to include any of these groups together?”***
* ***“What ‘combination of specific characteristics should participants have in order to be eligible for the group? (i.e., African American over 65 years of age?)”***

***“Now let’s think about each group and why it might be important to include them:”***

***FQ2: “Why is it important to include these groups?”***

***FQ3: “What information are we wanting to learn from them? What unique perspective would they provide? What might we expect to hear from them?”***

***FQ4: “How feasible would these groups be to recruit for and retain throughout the Topic group meetings?”***

**Step 1b: Brainstorming Service Provider Stakeholder Topic Group:**

[On a piece of paper (or projected), list out all the highlighted prioritized provider/other stakeholder subgroups from Matrix 2.]

***FQ1: “Looking at our final list of provider subgroups (those that were retained with the highest scores), who should we include as participants in our Topic groups? It’s important to understand that each group of people will bring a unique perspective to this project that will be reflected in their conceptual models and research questions. This may be helpful in thinking about who we want to include in this Topic group, as well as the feasibility of engaging them throughout the project.”***

* ***“Does it make sense to include any of these groups together?”***
* ***“What criteria would you like participants to meet in order to be eligible for the group? (i.e. Must be an African American over 65 years of age?)”***

***FQ2: “Why is it important to include these groups?”***

***FQ3: “What information are we wanting to learn from them? What unique perspective would they provide? What might we expect to hear from them?”***

***FQ4: “How feasible would these groups be to recruit for and retain throughout the Topic group meetings?”***

**Step 1c: Voting on Patient Stakeholder and Service Provider/Other Stakeholder Topic Groups:**

[On a piece of paper (or project), list out all the highlighted prioritized patient and provider/other stakeholder subgroups from Matrix 1 and Matrix 2.]

1. Each member of the research team should propose a specific Topic group of their choosing (see below for example groups). Go around the circle and write down each Topic group that is suggested.
2. Prior to voting, the research coordinator/facilitator should work to combine and eliminate redundancies and overlaps among the brainstormed list of Topic groups.
3. In order to narrow down groups, each research team member should be given ballots to cast their vote (sticky notes). The number of ballots each person receives should be equal to 1/3 of the number of Topic groups listed. (For example, if there are 9 Topic groups listed, each research team member will receive 3 ballots.)
4. Research team members should vote on their top Topic groups.
5. Repeat this voting process (if necessary) until there are the desired number of Topic groups remaining.

(**Example Patient Stakeholder Groups** from Richmond demonstration that were brainstormed during this step include: African American females, Senior Citizens with heart disease or obesity, Veterans with history of substance abuse, and Unemployed adults without health insurance.)

**NEXT STEP: DECIDING WHERE TO RECRUIT TOPIC GROUP PARTICIPANTS FROM. Please complete Matrix 3 (facilitation guides are not included)**

**PURPOSE OF TOOLS:** The following documents are meant to help the Community Research Team plan and prepare for Topic group meetings.

**TOOL INSTRUCTIONS:** Please modify the following templates to fit the goals and needs of your project. Where noted, fill in the specific health topic of focus, details about the Community Research Team, and Topic group meeting details. We also recommend adapting the Topic group meeting schedule and agenda items for each Topic group that is held.

For examples from the two demonstrations in Virginia, please see the example documents included as part of the Toolkit.

|  |  |  |
| --- | --- | --- |
| **Topic Group Role** | **Research team member name/Topic Group Assigned** | **Responsibilities** |
| **Facilitators (2 per Topic group is recommended)** |  | * Attend and assist with facilitation of meetings * Arrive to meeting location 15 minutes early * Be in communication with Topic group contact person about meeting attendance * Create a welcoming atmosphere for engaging Topic group participants * Act as [Community Research team name] liaison for communicating information between [Community Research team name] and Topic group * Help lead and facilitate Topic group meetings * Will consult with [project coordinator/investigator name] if questions or issues arise |
| **Meeting note-taker** |  | * Attend and take meeting notes during meetings * Arrive to meeting location 15 minutes early to help with room set-up, including audio recorder, computer equipment, camcorder, and food, etc. and room clean-up * Proofread and clean-up meeting notes before saving final version on computer * Act as [Community Research team name] liaison for communicating information between [Community Research team name] and Topic group * Will consult with [project coordinator/investigator name] if questions or issues arise |
| **Observation note-taker (optional)** |  | * Attend and take observation notes during facilitated activities * Familiarize self with each observation log prior to meeting * Assist in preparing meeting location, setting up food, etc. and room clean-up * Hand-in completed observation log to [project coordinator] * Act as [Community Research team name] liaison for communicating information between [Community Research team name] and Topic group * Will consult with [project coordinator/investigator name] if questions or issues arise |
| **Contact person** |  | * Collect and keep a record of Topic group members’ names, contact information, and preferred method of contact * Communicate with each Topic group member prior to each meeting date, to include: sending out reminder information about date, time, location, and length of meeting * Communication with Co-facilitator about Topic group members who will be attending and absent at each meeting * Will consult with [project coordinator/investigator name] if questions or issues arise |

|  |  |  |  |
| --- | --- | --- | --- |
| **Meeting Date** | **Meeting Time** | **Meeting Location** | **Agenda Items** |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |
| **[Date]** | **[Time]** | [Location] | [Agenda Items] |

**Community Research Team Roles:**

* Co-Facilitator (All Topic Group meetings): **[insert Community Research Team Members names]**
* Note-taker (All Topic Group meetings): **[insert Community Research Team Member name]**
* Contact person (ongoing): **[insert Community Research Team Member name]**
* Observation Note-taker (Facilitated Exercises only): **[insert Community Research Team Member name]**

**[Meeting location name]:** [Address]

**Topic Group 1**

**Meeting Dates and Length:**

* Meeting #1 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #2 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #3 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #4 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #5 (Week [X]): [Day, date, time frame] (3.5 hours)
* Meeting #6 (Week [X]): [Day, date, time frame] (3.5 hours)
* Meeting #7 (Week [X]): [Day, date, time frame] (3.5 hours)

**Roles:**

* Facilitators (all meetings): [Research team member names]
* Note-taker (all meetings): [Research team member name]
* Contact person (ongoing): [Research team member name]
* Observation Note-taker (Facilitated exercises only): [Research team member name]

**Topic Group 2**

**Meeting Dates and Length:**

* Meeting #1 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #2 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #3 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #4 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #5 (Week [X]): [Day, date, time frame] (3.5 hours)
* Meeting #6 (Week [X]): [Day, date, time frame] (3.5 hours)
* Meeting #7 (Week [X]): [Day, date, time frame] (3.5 hours)

**Roles:**

* Facilitators (all meetings): [Research team member names]
* Note-taker (all meetings): [Research team member name]
* Contact person (ongoing): [Research team member name]
* Observation Note-taker (Facilitated exercises only): [Research team member name]

**Topic Group 3**

**Meeting Dates and Length:**

* Meeting #1 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #2 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #3 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #4 (Week [X]): [Day, date, time frame] (1.5 hours)
* Meeting #5 (Week [X]): [Day, date, time frame] (3.5 hours)
* Meeting #6 (Week [X]): [Day, date, time frame] (3.5 hours)
* Meeting #7 (Week [X]): [Day, date, time frame] (3.5 hours)

**Roles:**

* Facilitators (all meetings): [Research team member names]
* Note-taker (all meetings): [Research team member name]
* Contact person (ongoing): [Research team member name]
* Observation Note-taker (Facilitated exercises only): [Research team member name]