

# A Toolkit to Plan and Evaluate the Development of a Community Research Agenda

Created to Support the Whole Child Growth Research Agenda Process

*We would like to acknowledge our project partners HealthPartners,  
Comunidades Latinas Unidas en Servicio (CLUES), Northside Achievement Zone (NAZ),  
and the University of Minnesota School of Public Health.  
We could not have done this evaluation without their partnership and participation – thank you!*

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## How to Use this Toolkit

1. Review our evaluation approach (Figure 1) and consider how each dimension relates to your project.
2. For more detailed descriptions of each phase, keep reading! We break down each phase in more detail.
3. Develop your evaluation plan.
4. Use the linked field notes, surveys, and meeting materials to view example data collection templates. Contact our study team if you would like a copy of templates you can edit for your project.
5. If your engagement plan includes a broader Stakeholder Group during Implement the Work, see the additional stakeholder surveys included in the Appendix.

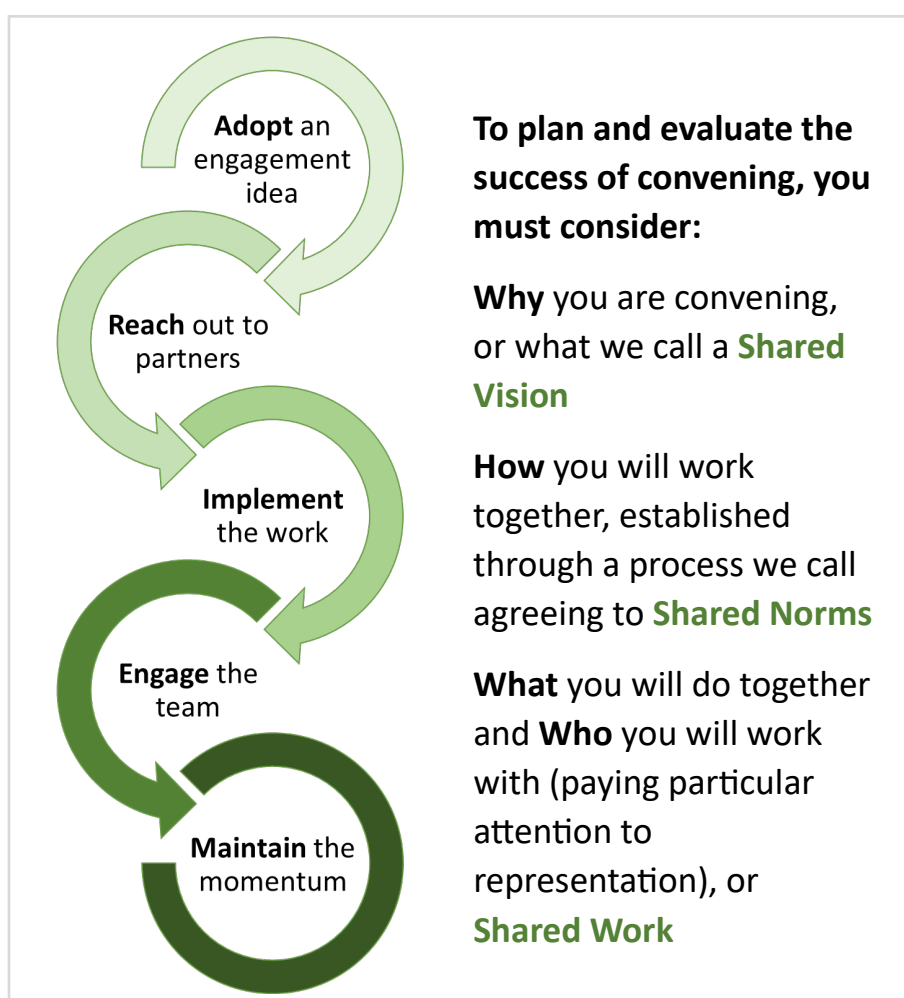
Feel free to contact our study team if you have questions or want to learn more.

## Introduction to the Toolkit

This toolkit provides guidance on developing and evaluating a community-centered approach to comparative effectiveness research (CER) and other research agenda setting. Traditional research approaches often miss voices from communities of color and/or asks community to participate in an intervention that was designed without them. In contrast, our team planned and evaluated a community-engaged approach that **centered local communities of color** from the very beginning, gathering a diverse “Core Team” of individuals from community-based organizations, health care, and research monthly as well as seeking broader feedback from “Stakeholder Groups” representing each of the three sectors. The work presented in this toolkit represents the first phase of community-engaged CER and other research – focusing first on **developing a Community Research Agenda**, including a vision and high-level plan – with community in year one. Our team was motivated by a desire to improve the way we study [whole child growth](#), but this toolkit was designed to be topic neutral and focuses on our approach rather than our content area.

The purpose of this Evaluation Toolkit is to help researchers systematically gather information to **reflect** on their community-engaged approach to developing a Research Agenda and **improve** the way they can engage the community throughout the process and in future work.

To do this, we integrated a common engagement framework with a locally developed tool to measure community convening. First, we adapted PCORI’s **RE-AIM Engagement Framework**<sup>1</sup> (with the dimensions reach, engagement, adoption, implementation, and maintenance) to ARI-EM (described in Figure 1 below) to better reflect the phases of our community research agenda development process. Then, we considered how to incorporate learnings from a locally developed **Community Convening Taxonomy** and aligned pragmatic survey tool that we had developed previously in partnership with our community health team drawn from a comprehensive, commonly used tool from Wilder Research.<sup>2</sup> This integration allowed our team to quickly build a systematic evaluation approach that considered how each dimension of quality convening applies during the phases of research agenda development.



**Figure 1.** A Summary of the Eight Dimensions used in Evaluation Approach, adapted from the RE-AIM Engagement Framework and Community Convening Taxonomy

<sup>1</sup> Glasgow RE, Harden SM, Gaglio B, Rabin B, Smith ML, Porter GC, Ory MG, Estabrooks PA. RE-AIM Planning and Evaluation Framework: Adapting to New Science and Practice With a 20-Year Review. *Front Public Health*. 2019 Mar 29;7:64. <doi: 10.3389/fpubh.2019.00064.> PMID: 30984733; PMCID: PMC6450067.

<sup>2</sup> Mattessich, P, Johnson, K. 2018. *Collaboration: What Makes It Work* (3<sup>rd</sup> ed.) Fieldstone Alliance.

To gather data, we:

- 1) used **field notes** to guide facilitators' reflections and document meeting agendas and meeting facilitation strategies according to the above dimensions (see Figure 2)
- 2) administered short, bimonthly **surveys** with core team members and post-convening surveys with other stakeholders; we designed items to measure relevant dimensions during each phase of the process (see Figure 3)

This approach allowed us to **gather rapid feedback**, **reflect** on each convening, and **improve plans** based on what we learned.

**Figure 2.** Overview of **Field Notes** (see Appendix for templates)

	<b><u>Adopt an engagement idea</u></b>	<b><u>Reach out to partners</u></b>	<b><u>Implement the work</u></b>	<b><u>Engage the team</u></b>	<b><u>Maintain the momentum</u></b>
<b>Shared Vision</b>	What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?	What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?	What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?		
<b>Shared Norms</b>			What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?	What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?	
<b>Shared Work</b>			What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?	What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?	What activities did the facilitators plan? What did they do? How did the members engage in the activities? What changed as a result?

**Figure 3.** Overview of **Survey Items** (see Appendix for templates)

	<b>Adopt an engagement idea</b>	<b>Reach out to partners</b>	<b>Implement the work*</b>	<b>Engage the team</b>	<b>Maintain the momentum</b>
<b>Shared Vision</b>	Is the proposal compelling?	Is the proposal compelling?	Is the vision still compelling?  Do we agree on how we define the issue?  Does the way we talk about this issue align with stakeholders?		
<b>Shared Norms</b>		Which shared norms do you need in order to participate?	Did we establish ground rules about how we treat each other?		
<b>Shared Work</b>	Does the convened group reflect the diversity of those affected by the issue?	Does the convened group reflect the diversity of those affected by the issue?  Has the leader secured adequate funding?	Does the convened group have diverse ideas about how to address the issue?  Were group members committed to shared work?  Acknowledge one another's work?  Evaluate progress toward goals?  Compensated fairly?  What would you like to work on in the future?	Were group members committed to shared work?  Acknowledge one another's work?  Evaluate progress toward goals?  Compensated fairly?  What would you like to work on in the future?	Were group members committed to shared work?  Acknowledge one another's work?  Evaluate progress toward goals?  Compensated fairly?  What would you like to work on in the future?
	Does the facilitator keep the group engaged?	Does the facilitator keep the group engaged?	Does the facilitator keep the group engaged?	Does the facilitator keep the group engaged?	Does the facilitator keep the group engaged?  Do you think this work will lead to additional work on this issue?  Do you plan to work with group members on this issue in the future?

\*Note that Implement the Work phase included hosting Stakeholder Group conversations. We created additional surveys to gather information from Core Team members who facilitated these conversations and Stakeholder Group participants. See the Appendix for more information.

## Our Approach to Plan and Evaluate the Process of Creating a Community Research Agenda

We organized this section by each phase of the community-engaged CER and other research agenda development process, as guided by our adapted ARE-IM Framework. Here, we provide more detailed information about how to **plan a convening** that seeks to create a community research agenda and how to **evaluate** that convening using our identified dimensions for each phase and aligned data collection templates. We also share reflections and lessons learned along the way.



### Adopt an Engagement Idea or Topic

	Shared Work & Shared Norms (Process)	Shared Vision (Outcomes)
<b>Tasks to Plan Convening</b>	<ul style="list-style-type: none"> <li>Secure adequate resources</li> </ul>	<ul style="list-style-type: none"> <li>Propose compelling vision</li> </ul>
<b>How to Evaluate Convening – Core Team</b>	<p>Field Notes</p> <ul style="list-style-type: none"> <li>Descriptions &amp; examples of adoption strategies planned for Core Team by sector</li> <li># of strategies planned for Core Team by sector</li> <li>Barriers &amp; facilitators of planning adoption strategies for Core Team by sector</li> </ul> <p>Survey</p> <ul style="list-style-type: none"> <li>Shared Vision</li> <li>Shared Work</li> </ul>	
<b>Lessons Learned from Evaluation</b>	<ul style="list-style-type: none"> <li>Explore feasible funding opportunities to support work before approaching community partners</li> <li>Ensure funding proposals include community partner stipends that cover their time and contributions</li> <li>Consider barriers to participation and seek to build solutions into funding proposal (e.g., food, childcare, translation)</li> <li>Ideally, the funding proposal can be led by an individual or organization that allocates time to develop a compelling vision and seek feedback on that vision prior to the award</li> <li>Identify a facilitator with facilitation and planning skills</li> </ul>	<ul style="list-style-type: none"> <li>Consider the drafted vision from multiple viewpoints</li> <li>Develop an ‘elevator pitch’</li> <li>Ask for feedback from community partners</li> </ul>

## Why are we here?

Perhaps a colleague or family member asked you what you were doing at 11:00 today...

1. What did you say you were doing (or how did you describe this project)?
2. Why did you tell them you joined this project team?

*Individually write down your answers & be prepared to share out*

**Figure 4.** Facilitated Activity during the **Adopt** an Engagement Idea or Topic phase to elicit ideas for our vision from a cross-sector group gathered to discuss possibility of co-writing grant proposal



## Reach out to Partners

	Shared Work & Shared Norms (Process)	Shared Vision (Outcomes)
<b>Tasks to Plan Convening</b>	<ul style="list-style-type: none"> <li>• Invite diverse perspectives &amp; sectors</li> <li>• Seek commitment to shared work</li> <li>• Avoid duplication with other convened groups</li> </ul>	<ul style="list-style-type: none"> <li>• Seek commitment to shared vision</li> </ul>
<b>How to Evaluate Convening – Core Team</b>	<p>Field Notes</p> <ul style="list-style-type: none"> <li>• Description of the sectors considered, included &amp; recruited</li> <li>• Description of recruitment (reach) strategies considered, tried, successful for Core Team by sector</li> <li>• #/% of Core Team individuals recruited, by recruitment method &amp; sector</li> <li>• Barriers &amp; facilitators of recruiting Core Team</li> </ul> <p>Survey</p> <ul style="list-style-type: none"> <li>• Shared Norms</li> <li>• Shared Work</li> </ul>	
<b>Lessons Learned from Evaluation</b>	<ul style="list-style-type: none"> <li>• Leverage existing relationships and connections</li> <li>• Understand contract and finance before approaching community partners</li> </ul>	<ul style="list-style-type: none"> <li>• Be intentional about language included in any materials describing your vision</li> <li>• Be humble in approach and invite honest feedback</li> <li>• Build trust so that partners can provide that honest feedback</li> <li>• Co-create the vision, and share updated visuals throughout refinement process</li> </ul>



**Figure 5.** Virtual Engagement Activity used during the **Reach** out to Partners phase to co-create a Shared Vision with inclusive language and ideas





## Implement the Work

	<b>Shared Work &amp; Shared Norms (Process)</b>	<b>Shared Vision (Outcomes)</b>
<b>Tasks to Plan Convening</b>	<ul style="list-style-type: none"> <li>• Create shared norms</li> <li>• Share the work &amp; credit</li> <li>• Be organized &amp; engaging to drive forward shared work</li> <li>• Build trusting relationships</li> <li>• Compensate work</li> <li>• Self-evaluate &amp; improve</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a compelling shared vision</li> </ul>
<b>How to Evaluate Convening</b>	<p>Field Notes</p> <ul style="list-style-type: none"> <li>• #/% of participants attending each Core Team meeting, by sector</li> <li>• # of implementation strategies delivered to Core Team by sectors</li> <li>• # of implementation strategies received &amp; enacted by Core Team by sector</li> <li>• Barriers and facilitators of delivery, receiving, enacting implementation strategies</li> </ul> <p>Core Team Survey</p> <ul style="list-style-type: none"> <li>• Shared Norms</li> <li>• Shared Work</li> </ul> <p>Facilitator &amp; Participant Surveys</p> <ul style="list-style-type: none"> <li>• Shared Norms</li> <li>• Shared Work</li> </ul>	<p>Core Team Survey</p> <ul style="list-style-type: none"> <li>• Shared Vision</li> </ul> <p>Facilitator &amp; Participant Surveys</p> <ul style="list-style-type: none"> <li>• Shared Vision</li> </ul>
<b>Lessons Learned from Evaluation</b>	<ul style="list-style-type: none"> <li>• Build in time each meeting for a warm welcome or community building activity</li> <li>• Revisit norms each meeting; be open to changing norms and adapting plans</li> <li>• Provide frequent communication (including emails, follow up calls) but also be mindful of your ask as the work falls on facilitators to plan effectively</li> <li>• Facilitator should help monitor mic time and invite those who have not spoken to share</li> <li>• Be mindful of traditional power dynamics</li> </ul>	<ul style="list-style-type: none"> <li>• Plan activities that allow for multiple ways of sharing ideas (written, oral)</li> <li>• Center voices of community organizations and members throughout the process</li> </ul>

**Figure 6.** Items from a Core Team survey administered during the **Implement** the Work phase as part of process to establish Shared Norms

PCOR Whole Child Growth Core Team Survey				
<b>3. Which of these shared norms do you need to be present or not in order to participate fully in our Core Team?</b>				
	<b>I need this to be a shared norm</b>	<b>I would like this to be a shared norm</b>	<b>I would not like this to be a shared norm</b>	<b>I cannot have this be a shared norm</b>
a. Be curious; commit to learning together	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
b. Listen actively to each other and be open to thinking in new ways	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
c. Share the mic; when you step back, stay engaged	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
d. Commit to creating a safe and brave space that can challenge systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
e. Embrace ambiguity; conversations will likely not feel "done" but we will honor the scheduled meeting time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
f. Camera use is welcome but not required	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
				reset
<b>4. Is there any feedback you'd like to give about the <u>existing</u> shared norms?</b>				

**Work**

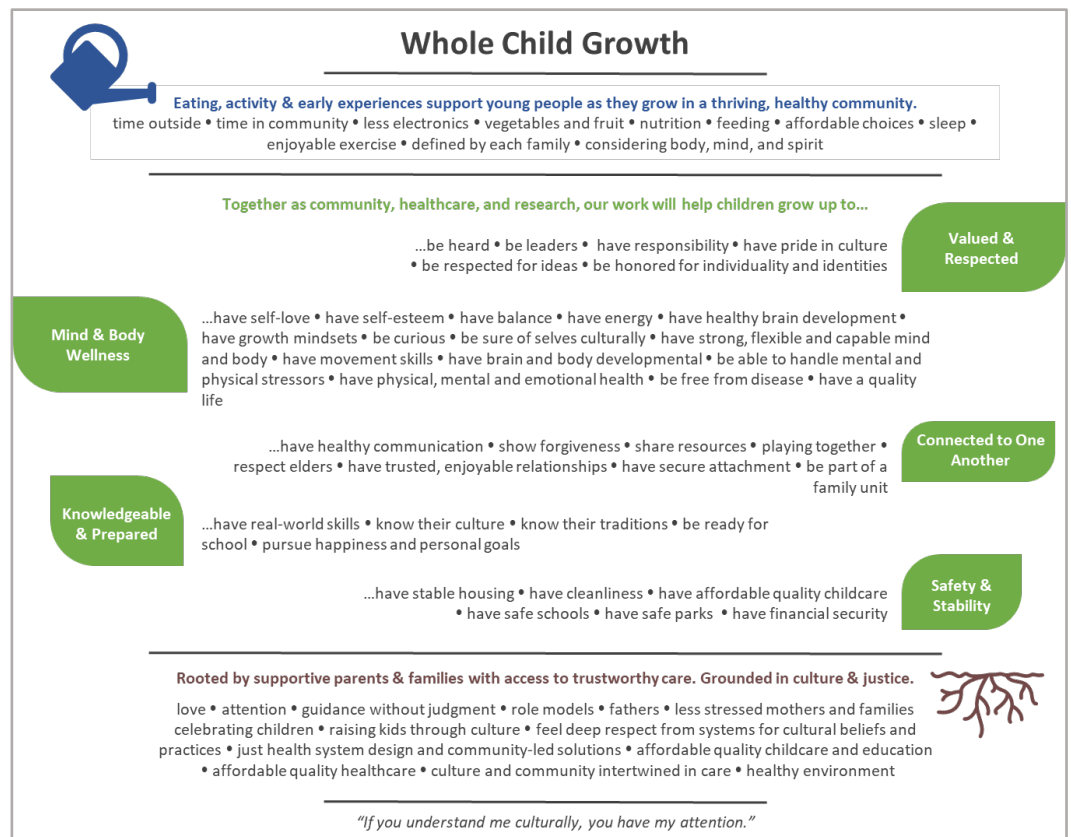
What did the facilitators plan?	Welcome – one word for intention or hope for the year Present slides summarizing winter meeting plans Small group breakout rooms and Jamboards by sector to brainstorm research questions Large group discussion to talk about use and audience(s) Large group feedback on purpose and sequence of stakeholder group conversations	
What did the facilitators implement?	-Round robin to share one word -All large group discussion – requested by a Core Team member (Alex) -Switched to Jamboard for brainstorm and encouraged multiple ways to participate (write, chat, share aloud)	
To what extent did Core Team members engage, by sector?	7/9 engaged	<i>Alyse and Maren facilitated, took notes Great engagement and discussion today!</i>
Describe how Core Team members engaged	During round robin – nice synergy, similar words about action, moving forward, boundaries, dismantling Spoke aloud Wrote in Teams chat Added sticky notes on Jamboard Asked clarifying questions	
What changed as a result of this engagement?	Order and purpose of stakeholder meetings – community first again; focus on brainstorming Content of research agenda – sections, language used, areas of focus	

**Figure 7.** Section of Field Notes taken after a Core Team meeting during the **Implement** the Work phase highlighting willingness to change facilitation plan to yield higher team engagement



## Engage the Team

	Shared Work & Shared Norms (Process)	Shared Vision (Outcomes)
<b>Tasks to Plan</b> <b>Convening</b>	<ul style="list-style-type: none"> <li>• Commit to collective action</li> <li>• Share back results with community</li> </ul>	<ul style="list-style-type: none"> <li>• Make impact in member organizations</li> <li>• Results in on-going partnerships among members</li> </ul>
<b>How to Evaluate</b> <b>Convening – Core Team</b>	<p>Field Notes</p> <ul style="list-style-type: none"> <li>• Assessment of which engagement strategies led to successful engagement or not &amp; illustrative examples of engagement opportunities that were or were not successful, by sector</li> <li>• Barriers &amp; facilitators to engagement of Core Team by sector</li> </ul> <p>Survey</p> <ul style="list-style-type: none"> <li>• Shared Work</li> </ul>	
<b>Lessons Learned from Evaluation</b>	<ul style="list-style-type: none"> <li>• Start talking early and often about potential next steps</li> <li>• Center community ideas in research agenda so that there is shared commitment</li> <li>• Create community facing materials, and budget for translation as needed for population(s)</li> </ul>	<ul style="list-style-type: none"> <li>• Relationships with organizations can be dependent on individual relationships</li> </ul>



**Figure 8.** A detailed version of our Shared Vision as defined by stakeholders engaged by our Core Team, created to share back with participants during the Engage the Team phase



## Maintain the Momentum

	Shared Work & Shared Norms (Process)	Shared Vision (Outcomes)
<b>Tasks to Plan Convening</b>	<ul style="list-style-type: none"> <li>Follow through on collective action</li> <li>Grow partnerships beyond members</li> </ul>	<ul style="list-style-type: none"> <li>Generate new ideas</li> </ul>
<b>How to Evaluate Convening – Core Team</b>	<p>Field Notes</p> <ul style="list-style-type: none"> <li>Description of the maintenance strategies delivered to disseminate the developed research agenda and evaluation toolkit across each sector</li> <li>Description of the maintenance strategies delivered to increase the likelihood of continuing partnerships beyond the award period</li> <li>Barriers and facilitators of maintaining relationships, proceeding with planned research, and other collective action</li> </ul> <p>Survey</p> <ul style="list-style-type: none"> <li>Shared Work</li> </ul>	<p>Survey</p> <ul style="list-style-type: none"> <li>Results of Shared Vision</li> </ul>
<b>Lessons Learned from Evaluation</b>	<ul style="list-style-type: none"> <li>It is really challenging to develop a research agenda with community while pursuing funding for future work</li> </ul>	<ul style="list-style-type: none"> <li>Document all ideas gathered throughout the process</li> <li>Have realistic conversations about feasibility and capacity</li> </ul>

### PCOR Whole Child Growth Core Team Survey #6

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2. What would you like to see happen next? Please share any ideas you have for future work as well as your own interest and capacity to contribute.

Expand

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3. Is there anything else you want to share about your experience as a Core Team member?

Expand

**Figure 9.** Items from a Core Team survey administered during the **Maintain the Momentum** phase to inform future work

## Key Learnings

- Much of this initial planning happened before the grant was awarded; more funding to support preparation to community-engaged research, especially identifying community-centered outcomes used in CER, is needed
- During our award, our Core Team had to prioritize our time on the Shared Vision, Shared Norms, and Shared Work; due to time and funding constraints, we had limited opportunity to partner on the evaluation design and development
- Alignment of dimensions from a well-supported engagement framework and a taxonomy and survey our team had already produced reduced the time we needed to spend developing these tools and allowed us to implement high-quality data collection **quickly and frequently**
- This allowed us to gather **real time feedback** and make process adjustments throughout the process
- Asking for feedback and honoring what we heard contributed to **trusting relationships** among our Core Team members
- Asking stakeholder group members about their experience in our convenings also honored their contributions
- A community research agenda is a time-consuming process, and we have much more work to do after the grant ends to **maintain the momentum**

## Appendix

1. Surveys
  - a. Survey Summary Spreadsheet
  - b. Survey Template per ARI-EM phase
    - i. Adopt
    - ii. Reach
    - iii. Implement
      1. Core Team
      2. Facilitator Stakeholder Meeting
      3. Participant Stakeholder Meeting
    - iv. Engage
    - v. Maintain
  - c. Survey Results template
2. Field Notes
  - a. Field Note Template per ARI-EM phase
    - i. Adopt
    - ii. Reach
    - iii. Implement
    - iv. Engage
    - v. Maintain
3. Meeting Materials
  - a. Example Slides of Key Tasks to Plan Convening
    - i. Warm Welcome
    - ii. Shared Norms
    - iii. Project Overview
    - iv. Survey Results & Reflection
    - v. Facilitated Activities

# 1.a Survey Template

	Adoption & Reach		Implement		Engage & Maintain	
	Core Team Survey 1	Core Team Survey 2	Core Team Survey 3	Core Team Survey 4	Core Team Survey 5	Core Team Survey 6
I care about the issues our Core Team is addressing.	x			x		
The organization I represent cares about the issues our Core Team is addressing.	x			x		
The sectors we represent (community organizations, healthcare, or research) care about the issues our Core Team is addressing.	x			x		
The communities we serve care about the issues our Core Team is addressing.	x			x		
Our Core Team reflects the diversity of the communities we serve.	x			x		
All or most Core Team members helped define ground rules for how we treat each other.		x	x			
There is common agreement in our Core Team about how we define the issues we are addressing.		x	x	x		
All or most individuals in this group agree on how we work together to address the community issue(s).				x		
All or most individuals in this group commit time, effort, ideas and/or resources to work being done to address the specific community issue(s).				x		
This group includes individuals with many different ideas about how to impact the community issue(s) we are addressing.					x	
Group members are committed to shared work on this project.					x	x
All or most individuals in this group acknowledge the contributions of all for the work that we do together to address the community issue(s).					x	x
This group evaluates progress toward our goals.					x	x
The work of this group will lead to additional work in the community to address the same issue(s).						x
The group facilitator drives the work forward to accomplish this project's goals					x	x
I plan to work with one or more members of this team on the issue we are trying to address.						x
The group facilitator secured adequate funding for this work.						x
We were compensated fairly for our participation in this group.						x
The member who organizes our Core Team effectively keeps us engaged.	x	x	x	x	x	x
<b>Open Ended - Shared Norms</b>	x					
Which of these shared norms do you need to be present or not in order to participate fully in our Core Team? Is there any feedback you'd like to give about the <u>existing</u> shared norms? Are there any <u>additional</u> norms you would like to add to this drafted list? Please list them here.						
<b>Open Ended - Shared Vision</b>						
To what extent does each phrase below match how you or [stakeholder] talk about [shared vision topic]? Please describe in detail what <u>one</u> of these [shared vision] phrases means to you or [stakeholder]. Please select a phrase you did not have time to talk about in our Core Team meeting Is there anything else you want to share about our Shared Vision?		x	x	x		
<b>Open Ended - Shared Work</b>						
What research question or topic are you most interested in working on in the future? Is there anything else you want to share about your experience as a Core Team member? What would you like to see happen next? Please share any ideas you have for future work as well as your own interest and capacity to contribute.					x	x

- Shared vision (A/R)
- Shared norms
- Shared Work (What)
- Shared Work (Who)
- Shared vision (I)
- Results on shared vision (E/M)

Survey Items	Healthcare & Research adapted language	Implement							
		Community Ppt Survey 1	HCR Ppt Survey 1	Community Facilitator Survey 1	HCR Facilitator Survey 1	Community Ppt Survey 2	HCR Ppt Survey 2	Community Facilitator Survey 2	HCR Facilitator Survey 2
The community we serve.../My community cares about the issue(s) we talked about at today's event.	The communities I serve through my work care about the issues we talked about at today's event.	x	x	x	x	x	x	x	x
	My sector (e.g., healthcare or research) cares about the issues we talked about at today's event.		x		x		x		x
The participants at this event reflect the diversity of... the community we serve/my community	The participants at today's event reflect the diversity of roles in my sector.	x		x		x		x	
	The participants at today's event included individuals with many different ideas about the issues we talked about.		x		x		x		x
The participants at this event had many different ideas about how to study and improve [shared vision topic].	The leaders of the project we talked about at today's event are from the community I serve through my work.		x		x			x	x
The leaders of today's event are from my community.	The leaders of the project we talked about at today's event are from my sector.	x	x			x	x		
The people who organized today's event kept us engaged.									
All or most participants at this event contributed ideas during today's event.		x	x	x	x	x	x	x	x
The materials I received helped me effectively facilitate this event.				x	x			x	x
The input we collected at this event will be useful for our Core Team's shared work.				x	x			x	x
I was compensated fairly for participating at today's event.		x				x			
My input at today's event will be used to help... my community/the community I serve through my work.		x	x			x	x		
	My input at today's event will be used to help my sector.		x				x		
<b>Open Ended - Shared Vision</b>		x x							
Today we talked about [shared vision topic]. What does [shared vision topic] mean to you?					x	x	x	x	x
<b>Open Ended - Shared Work</b>									
Describe one strategy that worked well to engage Stakeholder Group participants:									
Describe a strategy that did not work well to engage Stakeholder Group participants, or one thing you would like to try differently in the next meeting:									
Today we talked about research questions to study and improve [shared vision topic]. What research question do you think is most important for us to answer?									

Shared vision (A/R)
Shared norms
Shared Work (What)
Shared Work (Who)
Shared vision (I)
Results on shared vision (E/M)



**Adopt & Reach**

1.b.i & 1.b.ii

**[Project Name] Core Team Survey**

Please take a few minutes to answer the following questions about the work that we do together. This information will help us understand what is working and what can be improved to build our capacity and experience as a Core Team.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
I care about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization I represent cares about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The sector I represent (community organizations, healthcare, or research) cares about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The communities we serve care about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our Core Team reflects the diversity of the communities we serve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The member who organizes our Core Team effectively keeps us engaged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[Shared Norms]**

Is there any feedback you'd like to give about the existing shared norms? \_\_\_\_\_  
\_\_\_\_\_

Are there any additional norms you would like to add to this drafted list? Please list them here. \_\_\_\_\_  
\_\_\_\_\_

**Thank you for your responses. Your responses will inform future Core Team meetings. We will continue to ask you for your thoughts to shape our shared work.**

**Implement**

1.b.iii

**[Project Name] Core Team Survey**

Please take a few minutes to answer the following questions about the work that we do together. This information will help us understand what is working and what can be improved to build our capacity and experience as a Core Team.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
I care about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization I represent cares about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The sectors I represent (community organizations, healthcare, or research) cares about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The communities we serve care about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most Core Team members helped define ground rules for how we treat each other.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is common agreement in our Core Team about how we define the issues we are addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group agree on how we work together to address the community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group commit time, effort, ideas and/or resources to work being done to address the specific community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This group includes individuals with many different ideas about how to impact the community issue(s) we are addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group members are committed to shared work on this project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group acknowledge the contributions of all for the work that we do together to address the community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This group evaluates progress toward our goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The group facilitator drives the work forward to accomplish this project's goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The member who organizes our Core Team effectively keeps us engaged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[Shared Vision]**

To what extent does each phrase below match how you or [stakeholder] talk about [shared vision topic]?

\_\_\_\_\_

OR

Please describe in detail what one of these [shared vision] phrases means to you or [stakeholder]. *Please select a phrase you did not have time to talk about in our Core Team meeting.* \_\_\_\_\_

\_\_\_\_\_

AND

Is there anything else you want to share about our Shared Vision? \_\_\_\_\_

\_\_\_\_\_

**[Shared Work]**

Is there anything else you want to share about your experience as a Core Team member? \_\_\_\_\_

---

**Thank you for your responses. They will inform future Core Team meetings. We will continue to ask you for your thoughts to shape and evaluate our shared work.**

**[Project Name] Facilitator Stakeholder Meeting Survey**

Please take a few minutes to answer the following questions about this [community stakeholder/healthcare and research stakeholder] event you facilitated. This information will help us understand what is working and what can be improved in the future.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
The community we serve.../My community cares about the issue(s) we talked about at today's event.	○	○	○	○
The communities I serve through my work care about the issues we talked about at today's event.*	○	○	○	○
My sector (e.g., healthcare or research) cares about the issues we talked about at today's event.*	○	○	○	○
The participants at this event reflect the diversity of... the community we serve/my community.	○	○	○	○
The participants at today's event reflect the diversity of roles in my sector.*	○	○	○	○
The participants at this event had many different ideas about how to study and improve [shared vision topic].				
The participants at today's event included individuals with many different ideas about the issues we talked about.*	○	○	○	○
All or most participants at this event contributed ideas during today's event.	○	○	○	○
The materials I received helped me effectively facilitate this event.	○	○	○	○
The input we collected at this event will be useful for our Core Team's shared work.	○	○	○	○

[\* indicates survey items that should only be asked of Healthcare & Research representatives]

Describe one strategy that worked well to engage Stakeholder Group participants: \_\_\_\_\_  
 \_\_\_\_\_

Describe a strategy that did not work well to engage Stakeholder Group participants, or one thing you would like to try differently in the next meeting: \_\_\_\_\_  
 \_\_\_\_\_

**Thank you for your responses. We will review these responses in a future Core Team meeting and will continue to ask you for your thoughts to shape and evaluate our shared work.**

**[Project Name] Participant Stakeholder Meeting Survey**

Please answer these questions to share your thoughts about today’s event. There are no right or wrong answers and you can skip any questions you don’t want to answer. Your name will not be kept with your answers.

How much do you agree or disagree with these statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
The community we serve.../My community cares about the issue(s) we talked about at today’s event.	○	○	○	○
The communities I serve through my work care about the issues we talked about at today’s event.*	○	○	○	○
My sector (e.g., healthcare or research) cares about the issues we talked about at today’s event.*	○	○	○	○
The participants at this event reflect the diversity of... the community we serve/my community.	○	○	○	○
The participants at today’s event reflect the diversity of roles in my sector.*	○	○	○	○
The participants at this event had many different ideas about how to study and improve [shared vision topic].				
The participants at today’s event included individuals with many different ideas about the issues we talked about.*	○	○	○	○
The leaders of today’s event are from my community.	○	○	○	○
The leaders of the project we talked about at today’s event are from the community I serve through my work.*	○	○	○	○
The leaders of the project we talked about at today’s event are from my sector.*	○	○	○	○
The people who organized today’s event kept us engaged.	○	○	○	○
All or most participants at this event contributed ideas during today’s event.	○	○	○	○
I was compensated fairly for participating at today’s event.	○	○	○	○
My input at today's event will be used to help... my community/the community I serve through my work.	○	○	○	○
My input at today's event will be used to help my sector.*	○	○	○	○

[\* indicates survey items that should only be asked of Healthcare & Research stakeholders]

Today we talked about [shared vision topic]. What does [shared vision topic] mean to you? \_\_\_\_\_  
 \_\_\_\_\_

Today we talked about research questions to study and improve [shared vision topic]. What research question do you think is most important for us to answer? \_\_\_\_\_  
 \_\_\_\_\_

**Thank you for your answers. These will help us improve future events and the work of this project.**

These last questions are optional and will be used to help us describe who came to this event. Please answer these questions if you would like.

With which racial or ethnic group(s) do you identify? *Select all that apply.*

- Asian/Asian American
- Black/African American
- Hispanic/Latino/Latina/Latinx
- Indigenous, American Indian or Alaskan Native
- Native Hawaiian or other Pacific Islander
- White
- Another racial or ethnic group, please describe: \_\_\_\_\_

How do you identify your gender?

- Male
- Female
- Transgender
- I use a different term, please describe: \_\_\_\_\_

Thinking of the people living in your household including yourself...

How many of those people are 0 to 5 years old? \_\_\_\_\_

How many of those people are 6 to 18 years old? \_\_\_\_\_

How many of those people are over 18 years old? \_\_\_\_\_

**Implement**

**[Project Name] Core Team Survey**

Please take a few minutes to answer the following questions about the work that we do together. This information will help us understand what is working and what can be improved to build our capacity and experience as a Core Team.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
I care about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The organization I represent cares about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The sectors I represent (community organizations, healthcare, or research) cares about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The communities we serve care about the issues our Core Team is addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most Core Team members helped define ground rules for how we treat each other.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is common agreement in our Core Team about how we define the issues we are addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group agree on how we work together to address the community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group commit time, effort, ideas and/or resources to work being done to address the specific community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This group includes individuals with many different ideas about how to impact the community issue(s) we are addressing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group members are committed to shared work on this project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group acknowledge the contributions of all for the work that we do together to address the community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This group evaluates progress toward our goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The group facilitator drives the work forward to accomplish this project's goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The member who organizes our Core Team effectively keeps us engaged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[Shared Vision]**

To what extent does each phrase below match how you or [stakeholder] talk about [shared vision topic]?

\_\_\_\_\_

OR

Please describe in detail what one of these [shared vision] phrases means to you or [stakeholder]. *Please select a phrase you did not have time to talk about in our Core Team meeting.* \_\_\_\_\_

\_\_\_\_\_

AND

Is there anything else you want to share about our Shared Vision? \_\_\_\_\_

\_\_\_\_\_

**[Shared Work]**

Is there anything else you want to share about your experience as a Core Team member? \_\_\_\_\_

---

**Thank you for your responses. They will inform future Core Team meetings. We will continue to ask you for your thoughts to shape and evaluate our shared work.**



**[Project Name] Facilitator Stakeholder Meeting Survey**

Please take a few minutes to answer the following questions about this [community stakeholder/healthcare and research stakeholder] event you facilitated. This information will help us understand what is working and what can be improved in the future.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
The community we serve.../My community cares about the issue(s) we talked about at today's event.	○	○	○	○
The communities I serve through my work care about the issues we talked about at today's event.*	○	○	○	○
My sector (e.g., healthcare or research) cares about the issues we talked about at today's event.*	○	○	○	○
The participants at this event reflect the diversity of... the community we serve/my community.	○	○	○	○
The participants at today's event reflect the diversity of roles in my sector.*	○	○	○	○
The participants at this event had many different ideas about how to study and improve [shared vision topic].				
The participants at today's event included individuals with many different ideas about the issues we talked about.*	○	○	○	○
All or most participants at this event contributed ideas during today's event.	○	○	○	○
The materials I received helped me effectively facilitate this event.	○	○	○	○
The input we collected at this event will be useful for our Core Team's shared work.	○	○	○	○

[\* indicates survey items that should only be asked of Healthcare & Research representatives]

Describe one strategy that worked well to engage Stakeholder Group participants: \_\_\_\_\_  
 \_\_\_\_\_

Describe a strategy that did not work well to engage Stakeholder Group participants, or one thing you would like to try differently in the next meeting: \_\_\_\_\_  
 \_\_\_\_\_

**Thank you for your responses. We will review these responses in a future Core Team meeting and will continue to ask you for your thoughts to shape and evaluate our shared work.**

**[Project Name] Participant Stakeholder Meeting Survey**

Please answer these questions to share your thoughts about today’s event. There are no right or wrong answers and you can skip any questions you don’t want to answer. Your name will not be kept with your answers.

How much do you agree or disagree with these statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
The community we serve.../My community cares about the issue(s) we talked about at today’s event.	○	○	○	○
The communities I serve through my work care about the issues we talked about at today’s event.*	○	○	○	○
My sector (e.g., healthcare or research) cares about the issues we talked about at today’s event.*	○	○	○	○
The participants at this event reflect the diversity of... the community we serve/my community.	○	○	○	○
The participants at today’s event reflect the diversity of roles in my sector.*	○	○	○	○
The participants at this event had many different ideas about how to study and improve [shared vision topic].				
The participants at today’s event included individuals with many different ideas about the issues we talked about.*	○	○	○	○
The leaders of today’s event are from my community.	○	○	○	○
The leaders of the project we talked about at today’s event are from the community I serve through my work.*	○	○	○	○
The leaders of the project we talked about at today’s event are from my sector.*	○	○	○	○
The people who organized today’s event kept us engaged.	○	○	○	○
All or most participants at this event contributed ideas during today’s event.	○	○	○	○
I was compensated fairly for participating at today’s event.	○	○	○	○
My input at today's event will be used to help... my community/the community I serve through my work.	○	○	○	○
My input at today's event will be used to help my sector.*	○	○	○	○

[\* indicates survey items that should only be asked of Healthcare & Research stakeholders]

Today we talked about [shared vision topic]. What does [shared vision topic] mean to you? \_\_\_\_\_

---

Today we talked about research questions to study and improve [shared vision topic]. What research question do you think is most important for us to answer? \_\_\_\_\_

---

**Thank you for your answers. These will help us improve future events and the work of this project.**

These last questions are optional and will be used to help us describe who came to this event. Please answer these questions if you would like.

With which racial or ethnic group(s) do you identify? *Select all that apply.*

- Asian/Asian American
- Black/African American
- Hispanic/Latino/Latina/Latinx
- Indigenous, American Indian or Alaskan Native
- Native Hawaiian or other Pacific Islander
- White
- Another racial or ethnic group, please describe: \_\_\_\_\_

How do you identify your gender?

- Male
- Female
- Transgender
- I use a different term, please describe: \_\_\_\_\_

Thinking of the people living in your household including yourself...

How many of those people are 0 to 5 years old? \_\_\_\_\_

How many of those people are 6 to 18 years old? \_\_\_\_\_

How many of those people are over 18 years old? \_\_\_\_\_

**Engage & Maintain**

1.b.iv

**[Project Name] Core Team Survey**

Please take a few minutes to answer the following questions about the work that we do together. This information will allow us to evaluate our shared work and improve our future approach to community engagement and partnership.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
Group members are committed to shared work on this project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group acknowledge the contributions of all for the work that we do together to address the community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This group evaluates progress toward our goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The work of this group will lead to additional work in the community to address the same issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The group facilitator drives the work forward to accomplish this project's goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to work with one or more members of this team on the issue we are trying to address.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The group facilitator secured adequate funding for this work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We were compensated fairly for our participation in this group.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The member who organizes our Core Team effectively keeps us engaged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What research question or topic are you most interested in working on in the future? \_\_\_\_\_

\_\_\_\_\_

*OR*

What would you like to see happen next? Please share any ideas you have for future work as well as you own interest and capacity to contribute. \_\_\_\_\_

\_\_\_\_\_

Is there anything else you want to share about your experience as a Core Team member? \_\_\_\_\_

\_\_\_\_\_

**Thank you for your responses.**

**Engage & Maintain**

1.b.v

**[Project Name] Core Team Survey**

Please take a few minutes to answer the following questions about the work that we do together. This information will allow us to evaluate our shared work and improve our future approach to community engagement and partnership.

To what extent do you agree or disagree with the following statements?

	Strongly Disagree	Somewhat Disagree	Somewhat Agree	Strongly Agree
Group members are committed to shared work on this project.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
All or most individuals in this group acknowledge the contributions of all for the work that we do together to address the community issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
This group evaluates progress toward our goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The work of this group will lead to additional work in the community to address the same issue(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The group facilitator drives the work forward to accomplish this project's goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I plan to work with one or more members of this team on the issue we are trying to address.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The group facilitator secured adequate funding for this work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We were compensated fairly for our participation in this group.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The member who organizes our Core Team effectively keeps us engaged.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What research question or topic are you most interested in working on in the future? \_\_\_\_\_

*OR*

What would you like to see happen next? Please share any ideas you have for future work as well as you own interest and capacity to contribute. \_\_\_\_\_

Is there anything else you want to share about your experience as a Core Team member? \_\_\_\_\_

**Thank you for your responses.**

I care abo The organ The sector The comm Our Core 1 All or mos There is cc All or mos All or most individuals in this group commit time, effort, ideas and/or resources to work being done to address the specific community issue(s). This group includes individuals with many different ideas about how to impact the community issue(s) we are addressing. I plan to work with one or more members of this team on the issue we are trying to address. The group We were compensated fairly for our participation in this group. The member who organizes our Core Team effectively keeps us engaged.

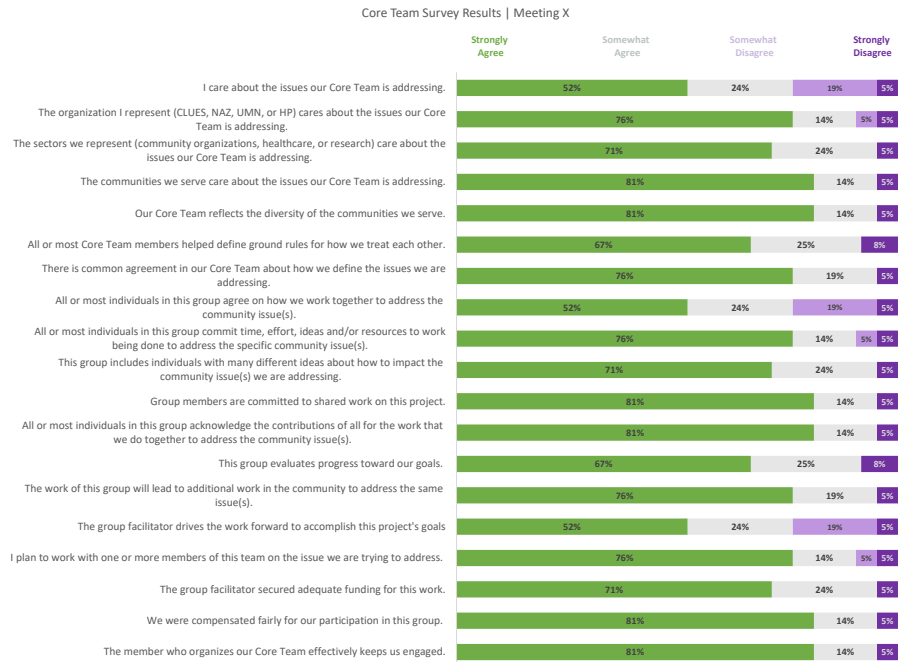
[EXAMPLE FORMULAS]

	Strongly A	Somewhat A	Somewhat D	Strongly D	Total	Check
I care abo	52%	24%	19%	5%	100%	
The organ	76%	14%	5%	5%	100%	
The sector	71%	24%	0%	5%	100%	
The comm	81%	14%	0%	5%	100%	
Our Core 1	81%	14%	0%	5%	100%	
All or mos	67%	25%	0%	8%	100%	
There is cc	76%	19%	0%	5%	100%	
All or mos	52%	24%	19%	5%	100%	
All or mos	76%	14%	5%	5%	100%	
This group	71%	24%	0%	5%	100%	
Group me	81%	14%	0%	5%	100%	
All or mos	81%	14%	0%	5%	100%	
This group	81%	14%	0%	5%	100%	
The work i	67%	25%	0%	8%	100%	
The group	52%	24%	19%	5%	100%	
I plan to w	76%	14%	5%	5%	100%	
The group	71%	24%	0%	5%	100%	
We were c	81%	14%	0%	5%	100%	
The memb	81%	14%	0%	5%	100%	

[EXAMPLE DATA]

	Strongly A	Somewhat A	Somewhat D	Strongly D	Total	Check
I care abo	52%	24%	19%	5%	100%	
The organ	76%	14%	5%	5%	100%	
The sector	71%	24%	0%	5%	100%	
The comm	81%	14%	0%	5%	100%	
Our Core 1	81%	14%	0%	5%	100%	
All or mos	67%	25%	0%	8%	100%	
There is cc	76%	19%	0%	5%	100%	
All or mos	52%	24%	19%	5%	100%	
All or mos	76%	14%	5%	5%	100%	
This group	71%	24%	0%	5%	100%	
Group me	81%	14%	0%	5%	100%	
All or mos	81%	14%	0%	5%	100%	
This group	67%	25%	0%	8%	100%	
The work i	76%	19%	0%	5%	100%	
The group	52%	24%	19%	5%	100%	
I plan to w	76%	14%	5%	5%	100%	
The group	71%	24%	0%	5%	100%	
We were c	81%	14%	0%	5%	100%	
The memb	81%	14%	0%	5%	100%	

[EXAMPLE VISUALIZATION]



My comm The partic The leader The people All or mos I was com My input : What doe: Race.ethnicity  
 [INSERT DATA - ONE ROW PER PARTICIPANT HERE]

Gender Ages 0-5 Ages 6-18 Older thar Age

[EXAMPLE FORMULAS]

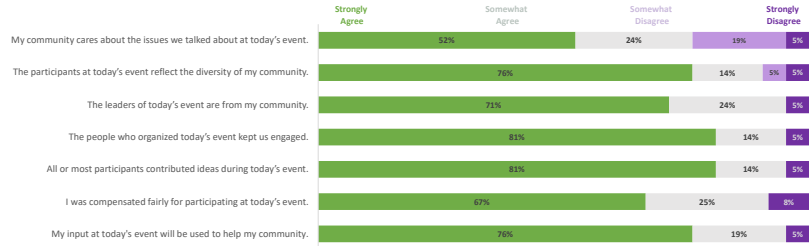
	Strongly A	Somewhat	Somewhat	Strongly D	Total	Check
My comm	0%	0%	0%	0%	0%	0%
The partic	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
The leader	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
The people	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
All or mos	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
I was com	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
My input :	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

[EXAMPLE VISUALIZATION]

[EXAMPLE DATA]

	Strongly A	Somewhat	Somewhat	Strongly D	Total	Check
My comm	52%	24%	19%	5%	100%	
The partic	76%	14%	5%	5%	100%	
The leader	71%	24%	0%	5%	100%	
The people	81%	14%	0%	5%	100%	
All or mos	81%	14%	0%	5%	100%	
I was com	67%	25%	0%	8%	100%	
My input :	76%	19%	0%	5%	100%	

Participant Experience at Fall Community Stakeholder Meetings - Combined



2.a

# AIR-EM | Meeting #

Month Date, 202X

## Meeting Agenda:

- Warm Welcome
- X

## Meeting Attendees (x/x)

Present: names

Absent: names

- Notes about absentees

## Survey Response Rate: x/x

## Survey constructs/items:

- [from survey spreadsheet]

## General Impressions of Meeting:

- X

## Vision

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

## Norms

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

## Work

What did the facilitators plan?	
---------------------------------	--



What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

**Is there anything else you want to note about this meeting?**

--

2.a.i

## Adopt an Engagement Idea | Meeting #

Month Date, 202X

### Meeting Agenda:

- Warm Welcome
- X

### Meeting Attendees (x/x)

Present: names

Absent: names

- Notes about absentees

### Survey Response Rate: x/x

### Survey constructs/items:

- [from survey spreadsheet]

### General Impressions of Meeting:

- X

### Vision

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x engaged	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

### Is there anything else you want to note about this meeting?

2.a.ii

## Reach out to Partners | Meeting #

Month Date, 202X

### Meeting Agenda:

- Warm Welcome
- X

### Meeting Attendees (x/x)

Present: names

Absent: names

- Notes about absentees

Survey Response Rate: x/x

### Survey constructs/items:

- [from survey spreadsheet]

### General Impressions of Meeting:

- X

### Vision

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

Is there anything else you want to note about this meeting?

**Implement the Work | Meeting #**

Month Date, 202X

**Meeting Agenda:**

- Warm Welcome
- X

**Meeting Attendees (x/x)**Present: namesAbsent: names

- Notes about absentees

**Survey Response Rate: x/x****Survey constructs/items:**

- [from survey spreadsheet]

**General Impressions of Meeting:**

- X

**Vision**

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
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**Norms**

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Describe how members engaged		
What changed as a result of this engagement?		

**Work**

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

**Is there anything else you want to note about this meeting?**

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# Engage the Team | Meeting #

Month Date, 202X

## Meeting Agenda:

- Warm Welcome
- X

## Meeting Attendees (x/x)

Present: names

Absent: names

- Notes about absentees

## Survey Response Rate: x/x

## Survey constructs/items:

- [from survey spreadsheet]

## General Impressions of Meeting:

- X

## Norms

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
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## Work

What did the facilitators plan?		
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To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

## Is there anything else you want to note about this meeting?

2.a.v

## Maintain the Momentum | Meeting #

Month Date, 202X

### Meeting Agenda:

- Warm Welcome
- X

### Meeting Attendees (x/x)

Present: names

Absent: names

- Notes about absentees

### Survey Response Rate: x/x

### Survey constructs/items:

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### General Impressions of Meeting:

- X

### Work

What did the facilitators plan?		
What did the facilitators implement?		
To what extent did members engage, by sector?	x/x	<i>Any notable differences by sector?</i>
Describe how members engaged		
What changed as a result of this engagement?		

### Is there anything else you want to note about this meeting?

3.a.

## Warm Welcome - Guidance

- Near the beginning of each meeting, ask the group an opening question
- The question should be relatively easy to answer and the facilitator should encourage everyone to speak aloud (this encourages participation throughout the meeting)
- The question should also somehow connect to the project or meeting agenda, or help the facilitator prepare to lead the meeting in some way
- A variety of examples used in our Whole Child Growth project are provided on the following slides



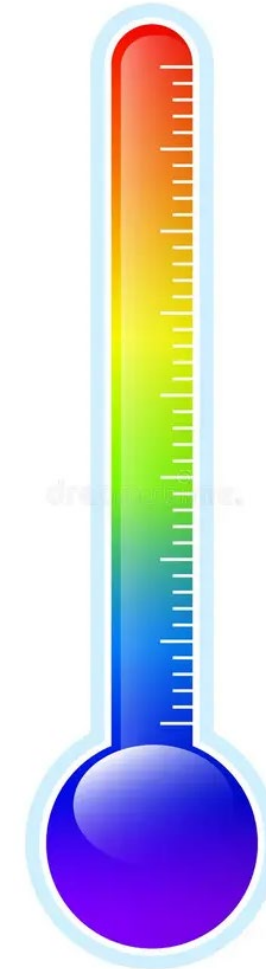
# Warm Welcome: Round-Robin

How do you see the change of season impacting whole-child growth in your community?



# Warm Welcome: Round Robin

Team member “temperature check” –  
How are you feeling coming into this meeting?



Hot – Anxious, too much going on, unable to engage

Warm – Comfortable, content

Cool – Calm but ready to move

Cold – Losing interest, needing things to change

# Happy New Year!

What is **one word** that represents  
a hope or intention you have for  
our work together this year?

# Warm Welcome

How has this project **changed the way you think** about whole child growth?

and/or

How have you **talked with others** outside of this project about whole child growth?

# Warm Welcome

*Which “garden” would you want and why?*





# Shared Norms - Guidance

- Teams should work together to establish shared norms at the beginning of their collaboration
- Each meeting, the norms should be reviewed to set the appropriate tone for the meeting, though the time spent on norms should decrease over the course of the project
- Team members should always be given the opportunity to propose changing norms
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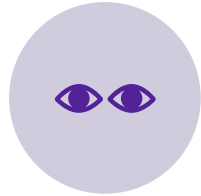
# Eating, Activity & Whole-Child Growth

Core Team – Meeting 9 (3/5/24)

Funded by the Patient-Centered Outcomes Research Institute (PCORI)

*Any changes to our shared norms before we dive in?*

*This meeting will not be recorded.*



Be curious; commit to learning together



Listen actively to each other and be open to thinking in new ways



Share the mic; when you step back, stay engaged



Commit to creating a safe and brave space that can challenge systems



Embrace ambiguity; conversations may not feel “done”, but will try not to cut short important discussion

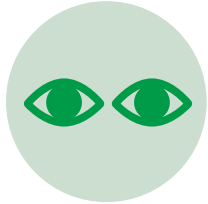


Participate as you are comfortable, you may have your camera on or off (note, meetings will not be recorded)



Ask for permission to go past scheduled meeting time; be willing to table agenda items for another meeting time

# Norms for Today's Meeting



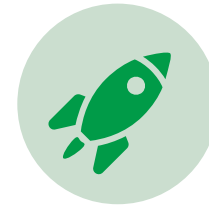
Be curious & learn together



Listen to each other



Share the mic, but stay engaged



Create a safe and brave space



Have time for good discussion, but topics might not feel finished



End at the scheduled time



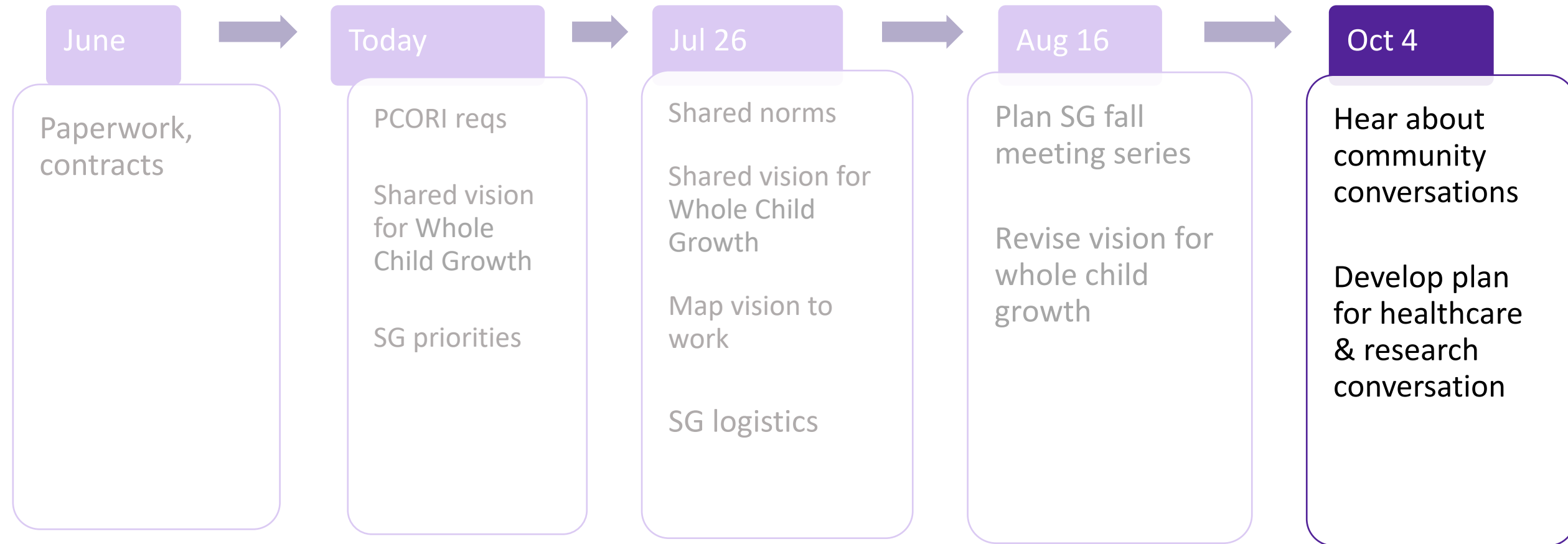
We will be taking notes today, but nothing you share will be linked to your name in any way.



# Project Overview - Guidance

- It is helpful for the facilitator to provide team members with broader project context
- In addition to a meeting agenda, we always included a slide that showed how the current meeting fit into a larger series of meetings
- We also provided a project overview at stakeholder meetings

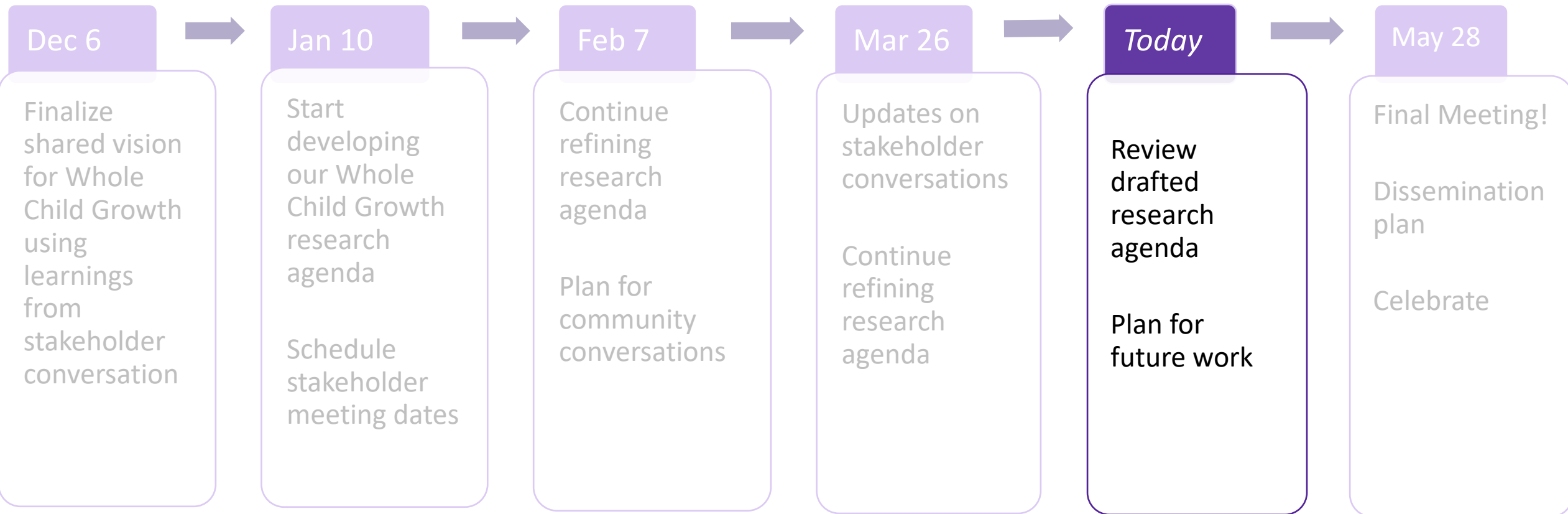
# Wrapping up our Fall Meetings



Evaluation

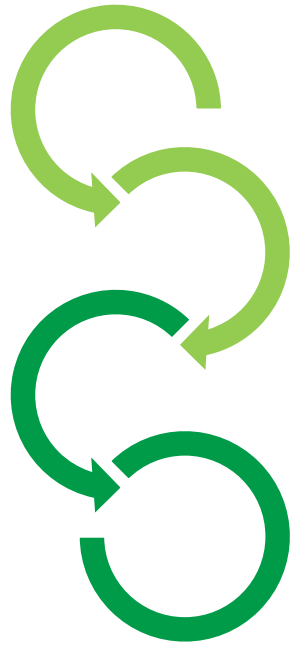


# Our Core Team's Spring Work



Evaluation →

# Our Core Team's Work



Core Team drafted **vision**

Community, Healthcare, Research reacted to **vision**

Community, Healthcare, Research brainstorm **research ideas**

Core Team develops **research agenda**

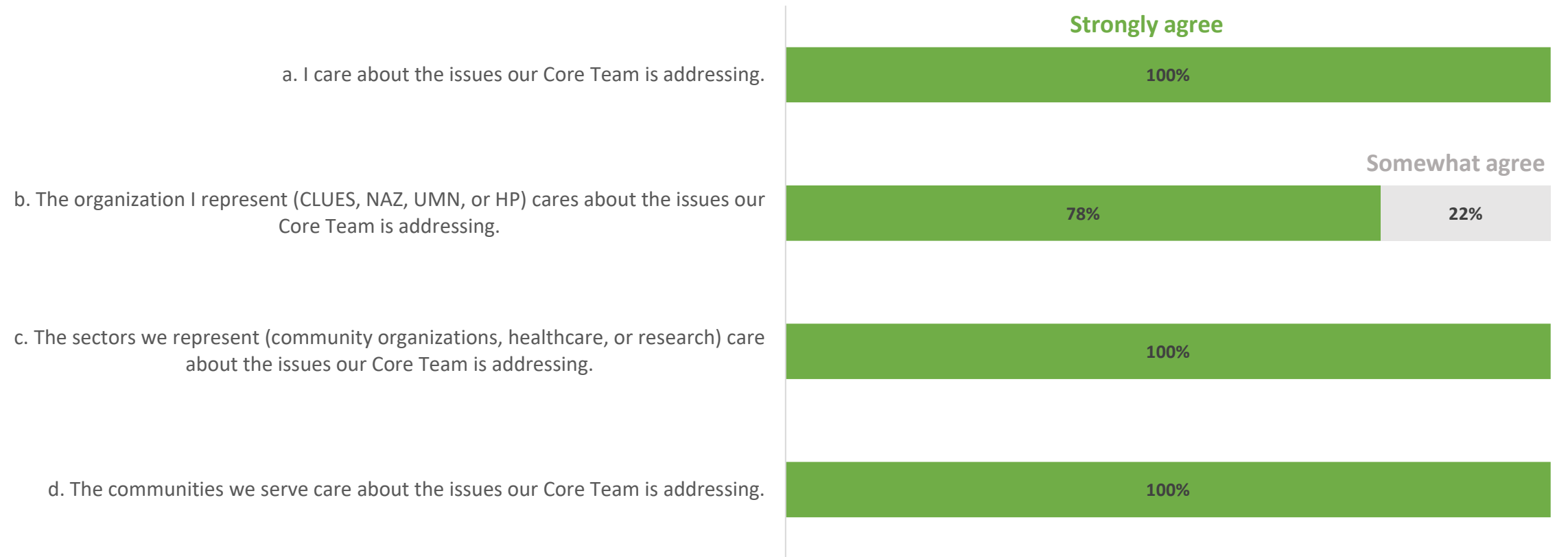


# Survey Results & Reflection - Guidance

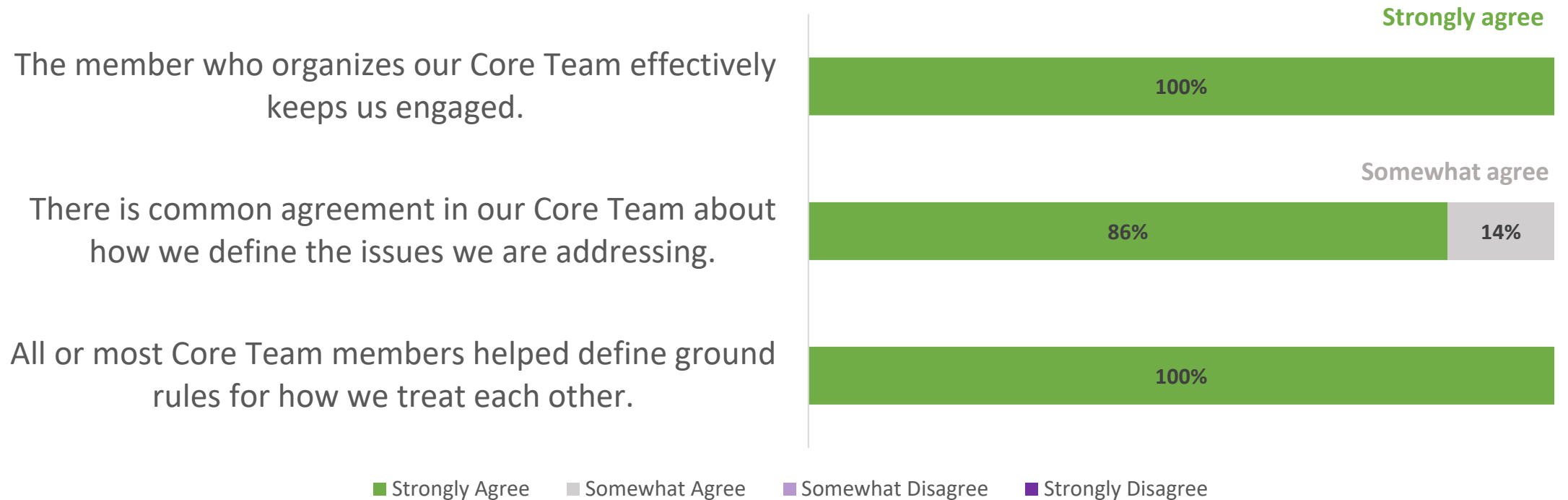
- We ensured our Core Team members could see the results of each survey we invited them to complete
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- We presented survey results and asked member to discuss and suggest changes to our approach

# Shared Vision Survey Results

All Core Team members agreed with each statement about our shared vision



# Survey Results (n=7) – any questions or concerns?



*Thank you for also defining phrases in our vision. We'll discuss at a future meeting.*

# Community Stakeholder Survey Responses

Participant Experience at Fall Community Stakeholder Meetings - CLUES





# Facilitated Activities

- Throughout the process, we used a variety of engagement methods to gather member and stakeholder ideas
- Our Core Team always meet virtually, but some stakeholder meetings happened in person
- We prioritized multiple ways for people to participate (aloud or in writing)
- We provided clear instructions and walked through an example before each activity
- In virtual meetings, we assigned someone other than the facilitator to lead the technology (such as assigning and managing breakout rooms)

If you were given unlimited dollars to **invest in the youth of your community** (where you live, work, or play)...

What is **one thing** you would spend money on?



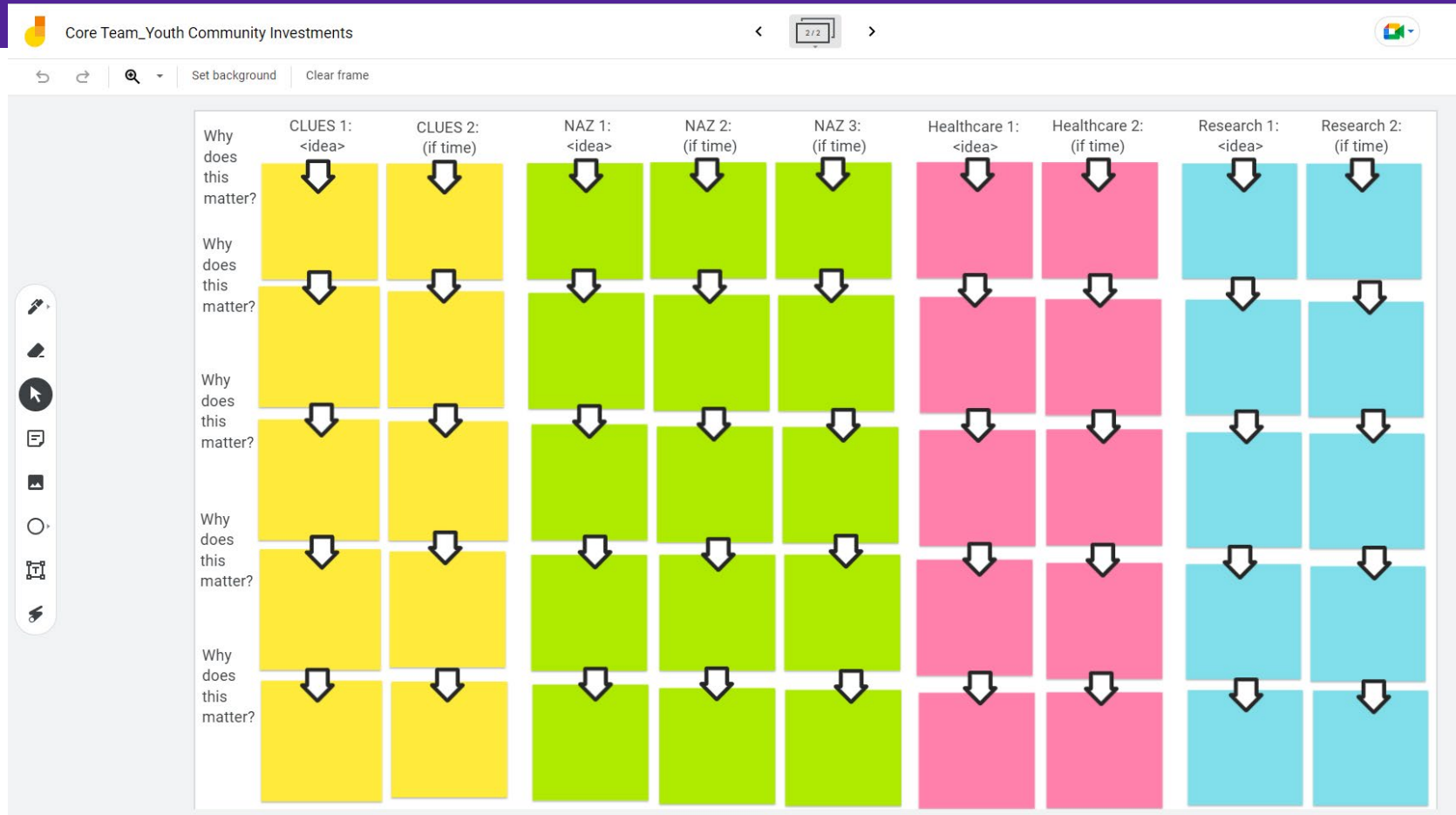


If you were given unlimited dollars to **invest in the youth of your community** what is **one thing** you would spend money on?

### Core Team investments:

- After school programming
- Better access to healthy food for families
- Food – education & access to fruits and vegetables for all children, every meal, all year round
- Safety for children
- Programming for youth that pays stipend to learn skills they are interested in related to the arts
- Financial literacy & housing stability support – all youth to have a safe, clean place to call home
- Invest in everyone else’s ideas 😊
- Working with undocumented children – legal services
- Better follow up with families identified as needing resources; long term connections/relationships
- Neighborhood based community spaces – green spaces w/ programs for families, social connections

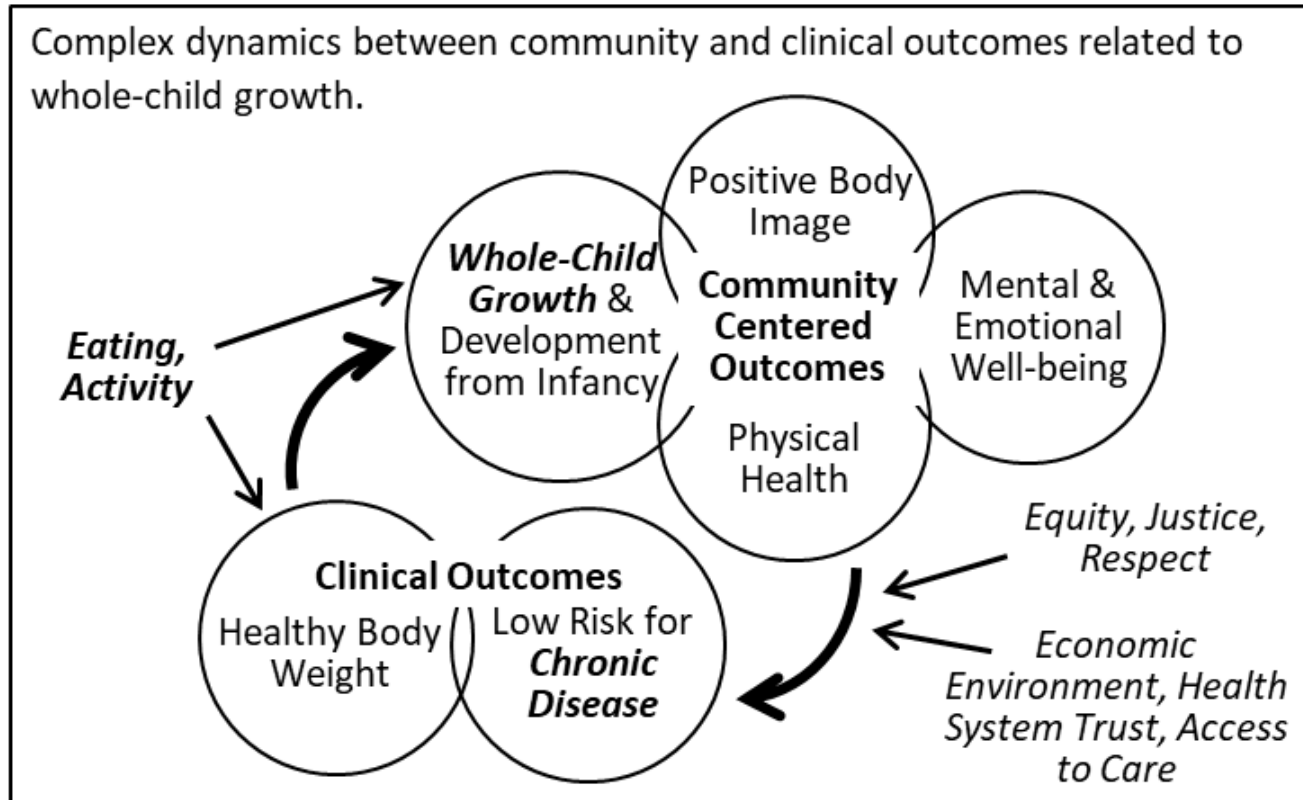
# Small Group – Jamboard



*Head to Jamboard for our next activity*

# Shared Vision Discussion

Compare Jamboard results to the image from our PCORI proposal:

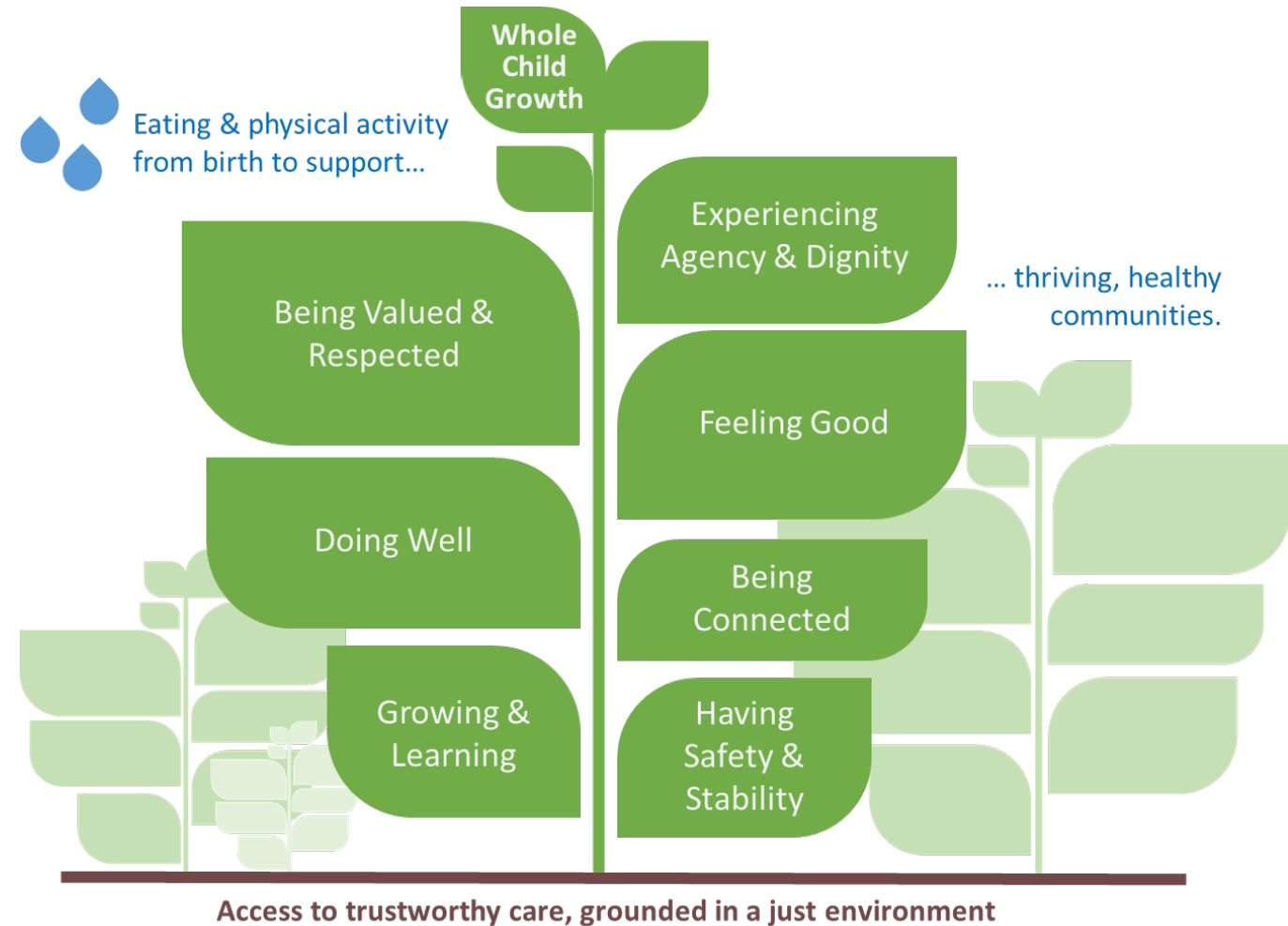


- Did you list any “clinical” outcomes?  
“Community-centered” outcomes?
- What are we missing?
- What do we want to change?

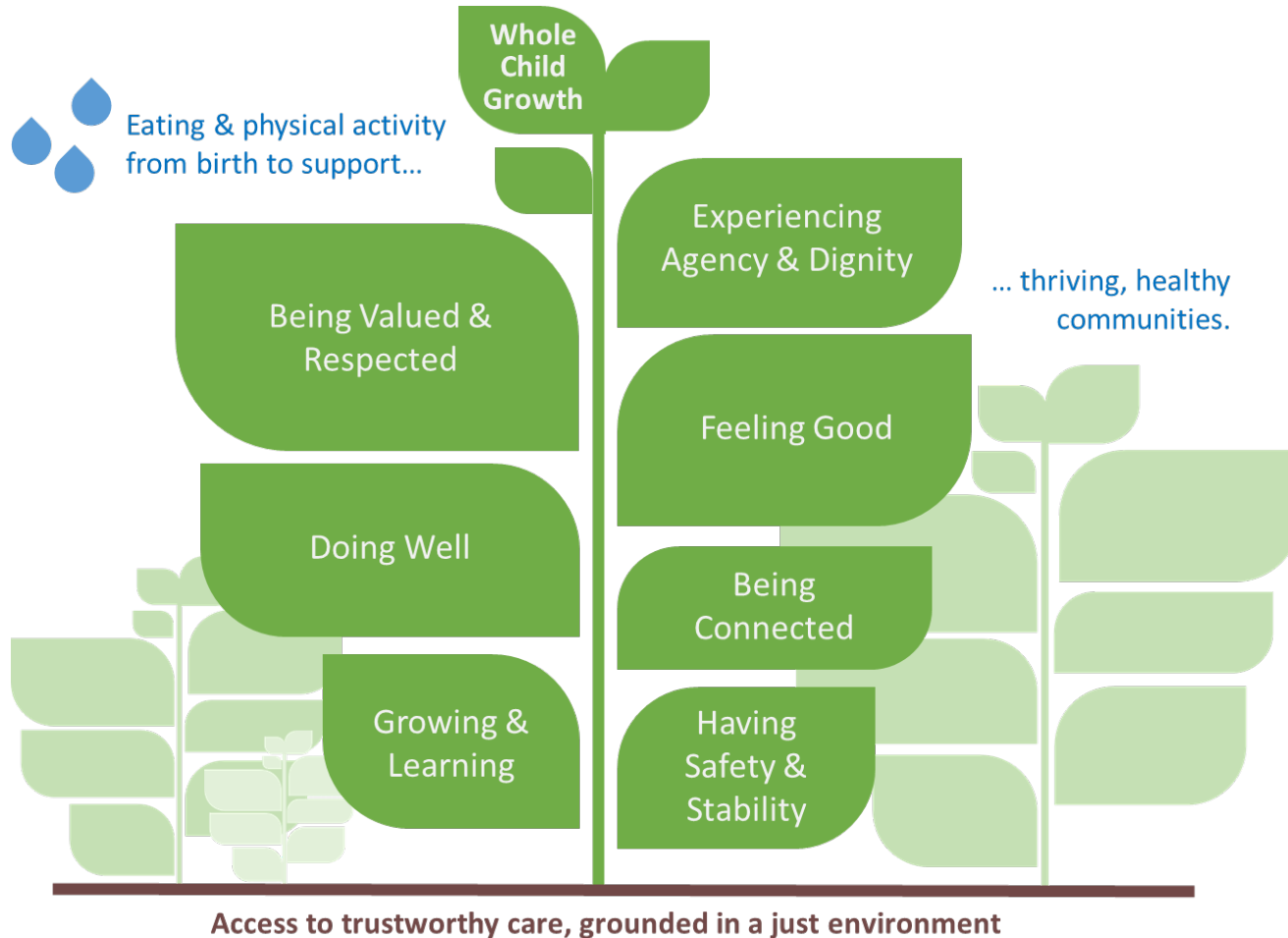
# Shared Vision? Think-Pair-Share

Imagine you are inviting a participant to our Stakeholder Group.

- Which of these **words** would you use to describe the project?
- Does the image help illustrate the vision?
- Are there any words you would **not** want to use?



# Defining our Vision



How would the **families you serve** talk about each of the leaves?

**How do you know** that a young child has each of these things?

(Pick 1-2 that feel most important to discuss)

# From Vision to Work Plan: Think, Pair, Share

- Main task from funder is to create guidelines for research (a “research agenda”)
- How can we shape our work together **this year** to support your own goals and/or those of your organization? In the future?

During our Award Year	Hopes for Ongoing Partnership
<ul style="list-style-type: none"><li>• Ex. Evaluation toolkit to help others evaluate successful community partnership</li><li>• Ex. Develop research guidelines related to whole child growth</li></ul>	<ul style="list-style-type: none"><li>• Ex. Partner with our cross-sector team on future research grants</li><li>• Ex. Disseminate findings to community partners' stakeholders</li></ul>

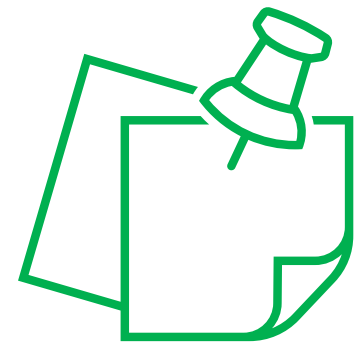


# Activity #1

Our goal is to **study & improve** whole child growth.

A research study tries to answer an important question. By asking questions, we can gather information and make something better.

What **questions** do you think we should try to answer to improve whole child growth?



# Examples: Activity 1

How can we help kids understand and make healthy food choices?

What is the impact of parents having access to culturally-specific parenting practices?

If parents had all their basic needs met, what would happen to their child's growth and development?

# Whole Child Growth



Eating, activity & early experiences support young people as they grow in a thriving, healthy community.



How can we help kids understand and make healthy food choices?

Rooted by supportive parents & families with access to trustworthy care.  
Grounded in culture & justice.

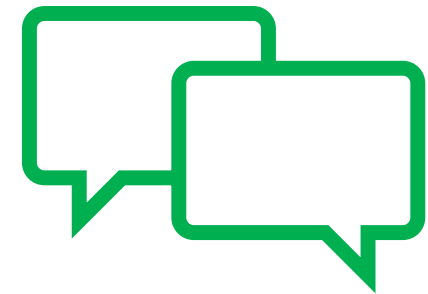
What is the impact of parents having access to culturally-specific parenting practices?

# Activity #2

Which questions do you think are the **most important** to answer?



Why?



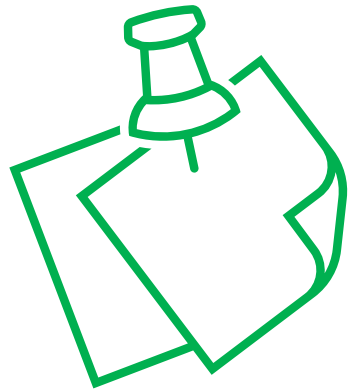
# Large Group Discussion

First, let's hear **research ideas** from each breakout room

- What stands out to you?
- What excites you?
- What do you want to know more about?

# Activity #2 – Barriers & Facilitators

Return to your breakout room.

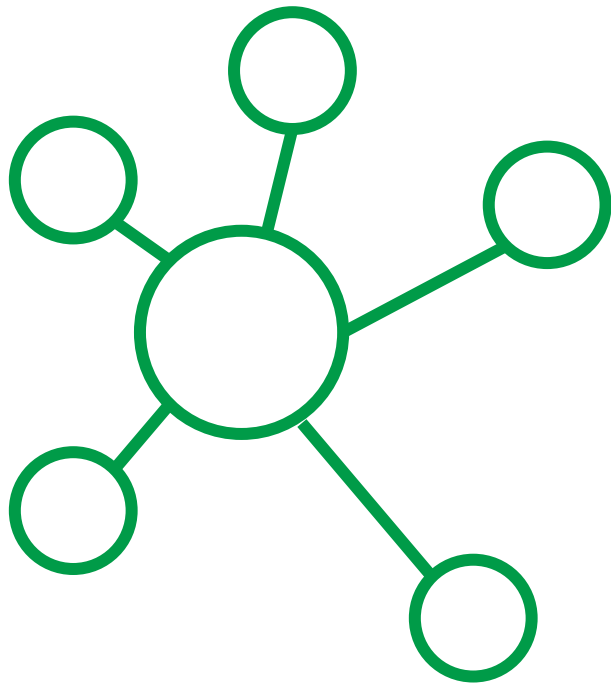


What **challenges** would you anticipate in the next steps of this work?

What would **help** move this work forward? What strategic advice do you have for our Core Team?

What would you want to be **involved** in?

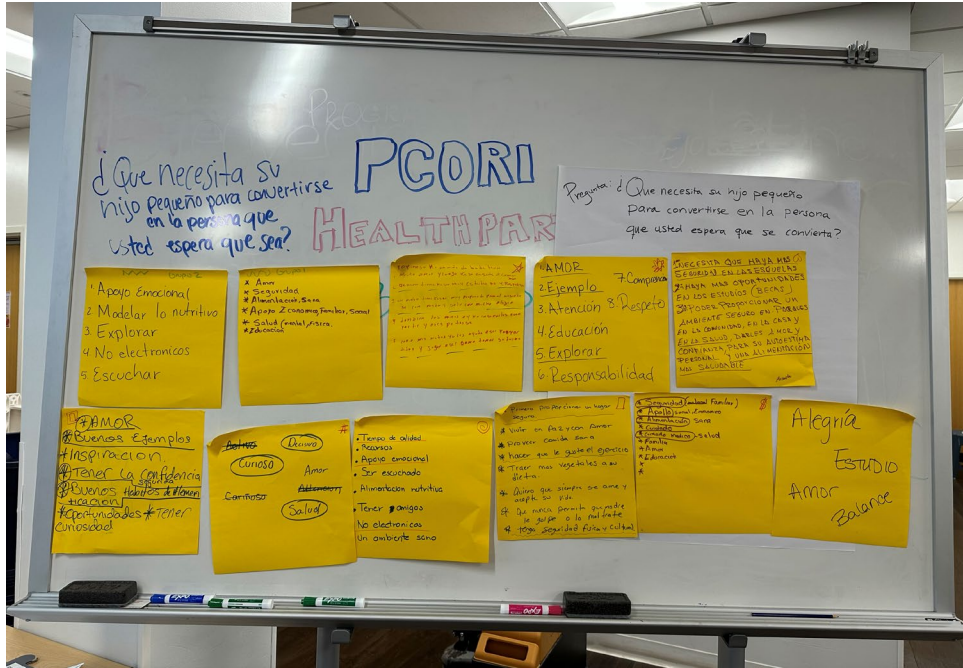
# Activity #3 – Resource Mapping



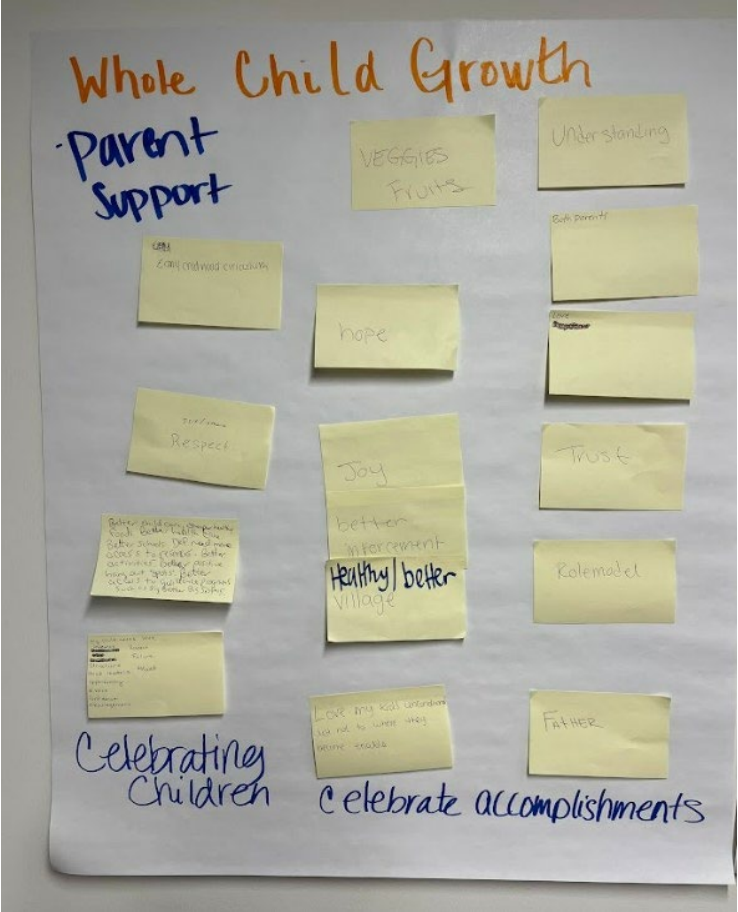
## Large Group Discussion

What other organizations, people, or funders should we **partner with to answer these questions?**

# Community Conversations: CLUES & NAZ



“One parent said to me that she was struggling to put into words on her survey what it meant to be in that space around others filling her up. It was great!”  
- Facilitator



“It was very powerful to witness the conversations of the parents. They brought up important topics as well as bringing a perspective that is strongly needed in these type of research projects.”  
-Facilitator





# Healthcare & Research Stakeholder Meeting

**1. What outcomes related to whole child growth are currently measured in healthcare?**

**2. What is prioritized?**  
Copy & paste the star and move to priority outcome sticky notes

**Healthcare**

- Blood pressures
- asthma control
- Immunizations completion of well child visits. Some mental health measures but these are fairly new (Pediatrician)
- Birth weight (avoiding low and high) -- from a CNM / OB perspective
- Post partum depression rates for moms (pediatrician).
- height/weight, especially in infancy/early childhood
- hearing/vision screening
- Hemoglobin
- ages and stages, MCHAT
- STD testing
- OB perspective: Maternal outcomes in pregnancy.
- PHQ9-t scores
- Community Health: Access (starting w pre-natal)
- Lead exposure
- Nicotine use
- ages and stages Questionnaires, M-Chat
- Preterm birth rate
- Inms in MN are measured a couple of ways - Combo 10 which is in kids under 12 yrs and Combo 2 which is the teen measure. MN Community measures for kids.
- In healthcare, it's tough to get prioritization because a lot of health care reimbursement is directly tied to adult outcomes, not kids.
- Compliance with Well child visits, immunizations, asthma control and depression (pediatrician)

What do you remember from this meeting?  
What stood out to you?

What went well?  
What would you like to change?

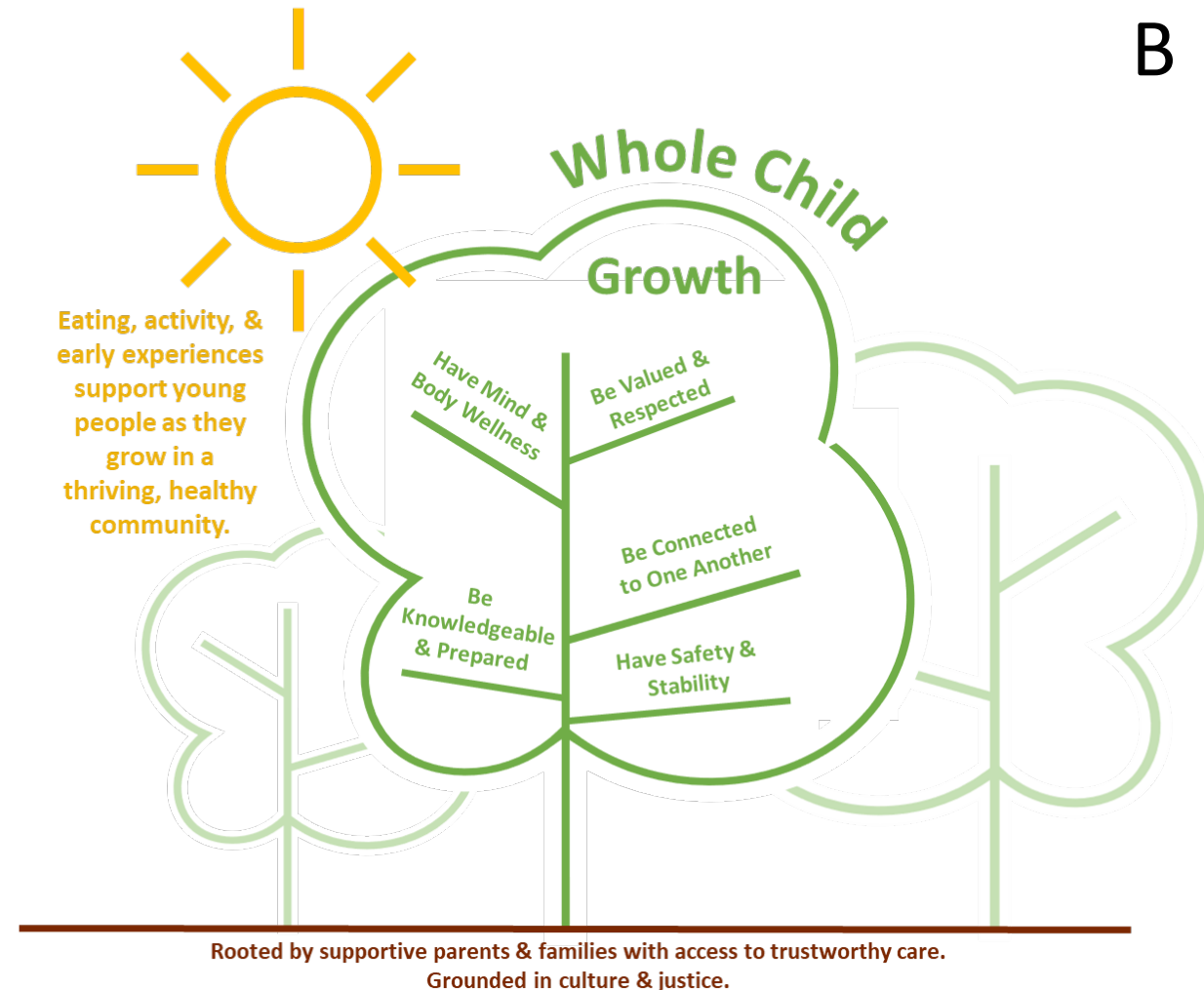
**What did you hear from our community that is the same as your original list?**

**What did you hear from our community that is different from your original list?**

- Note things that are the same in green
- Support for parents (measured in Healthcare through post-partum depression assessment)
- nutrition
- Note things that are different in orange
- Access
- trustworthy care
- celebrating children
- healthcare wants tangible measured outcomes
- love
- support for mothers
- natural foods
- Community responsive care is prioritized by individual clinicians but the resources to make these connections are limited which challenges care teams
- father / partners / caregiver education and support
- social drivers/determinants of health
- cultural grounding
- human experience / relationships between providers and caregivers

Healthcare Table - Activity 2

# Finalizing our Shared Vision



3.a.i

Warm  
Welcome

# Warm Welcome Guidance

- Near the beginning of each meeting, ask the group an opening question
- The question should be relatively easy to answer and the facilitator should encourage everyone to speak aloud (this encourages participation throughout the meeting)
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How do you see the change of season impacting whole-child growth in your community?



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How has this project **changed the way you think** about whole child growth?

and/or

How have you **talked with others** outside of this project about whole child growth?



# Warm Welcome

*Which “garden” would you want and why?*



3.a.ii

# Shared Norms

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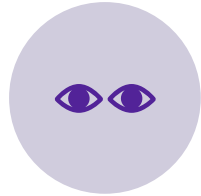
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Core Team – Meeting 9 (3/5/24)

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*This meeting will not be recorded.*

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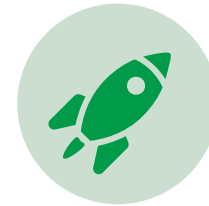
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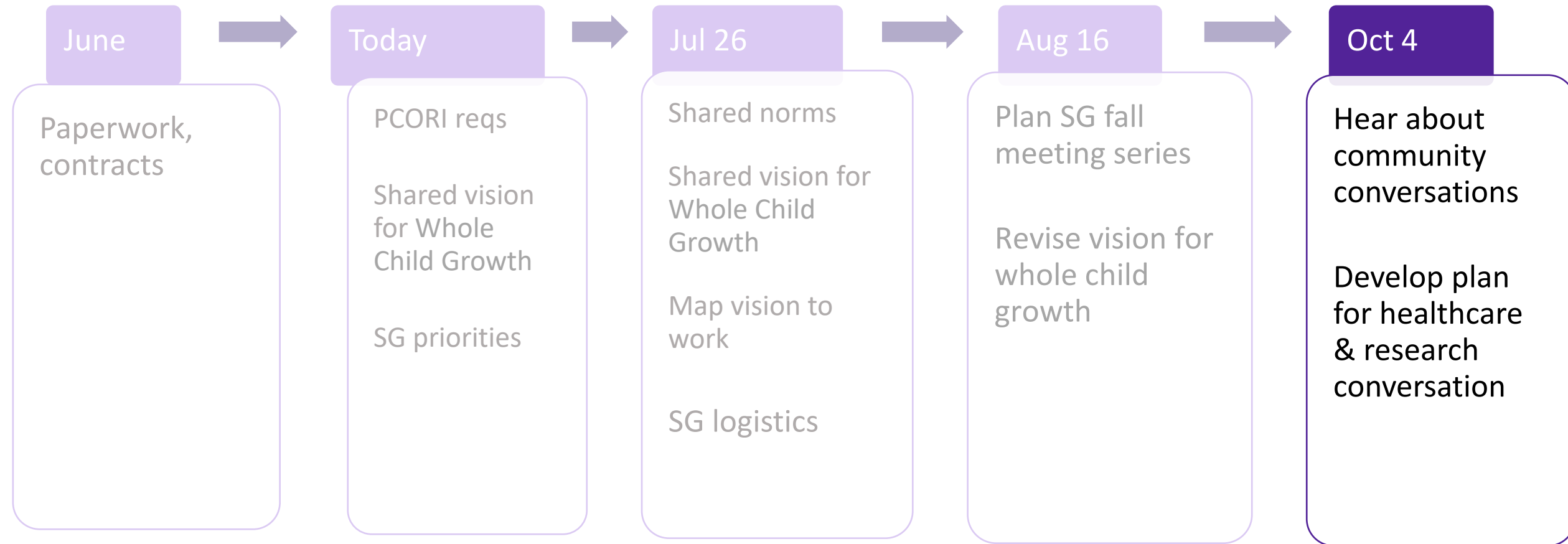
3.a.iii

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# Wrapping up our Fall Meetings

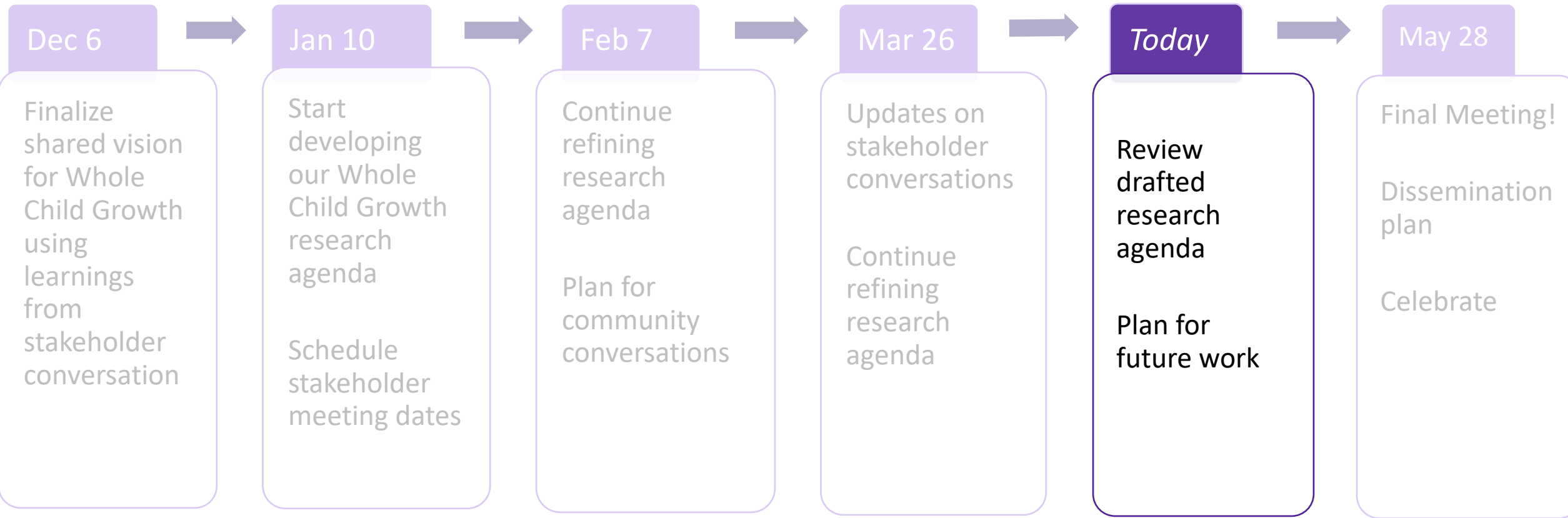


Evaluation



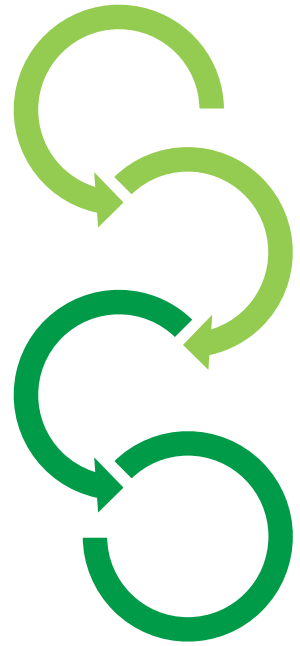


# Our Core Team's Spring Work



Evaluation

# Our Core Team's Work



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Community, Healthcare, Research brainstorm **research ideas**

Core Team develops **research agenda**



3.a.iv

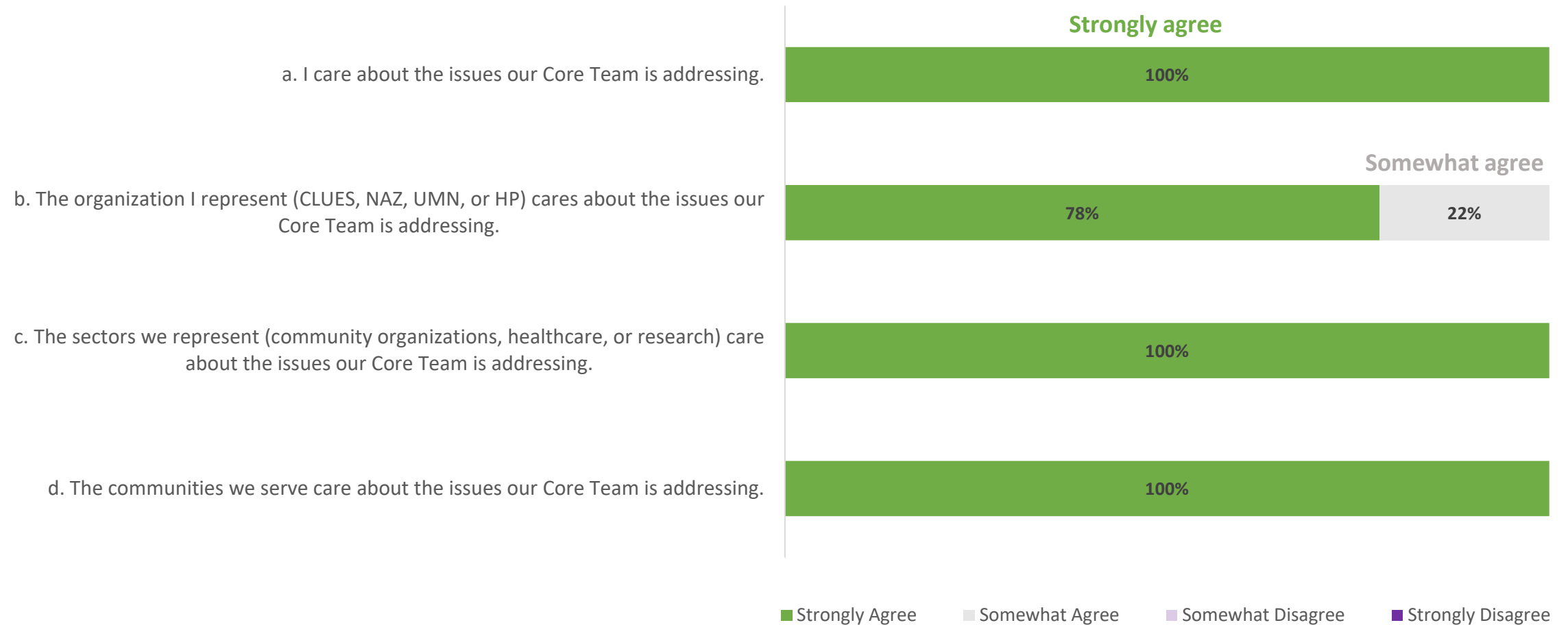
# Survey Results & Reflection

# Survey Results & Reflection Guidance

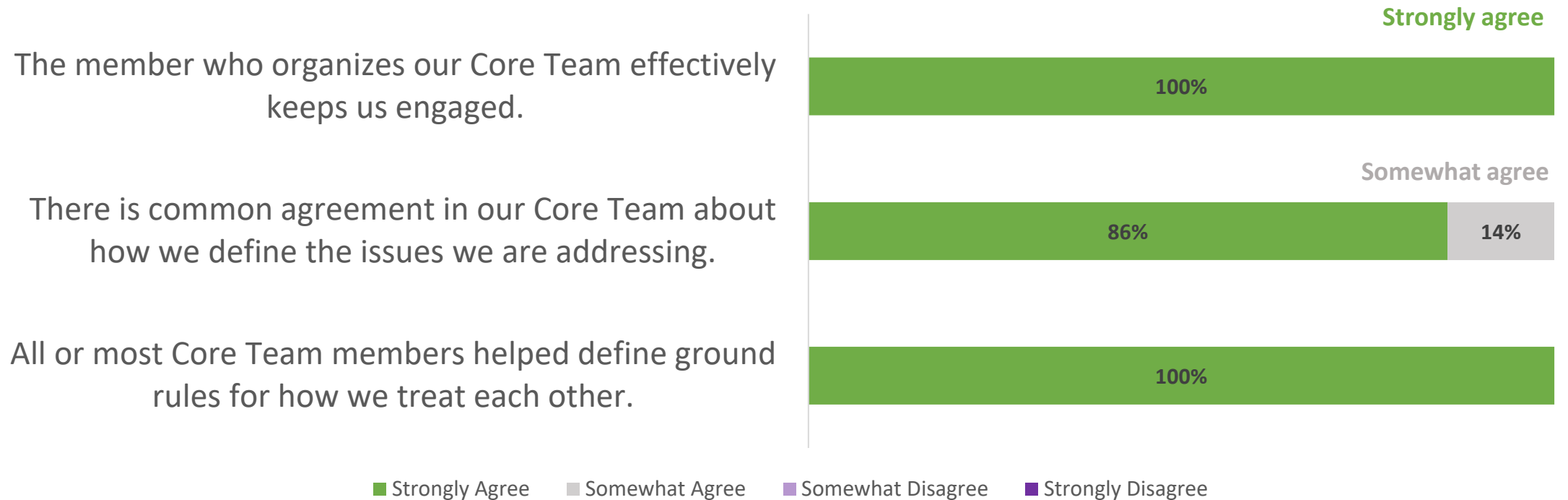
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All Core Team members agreed with each statement about our shared vision



# Survey Results (n=7) – any questions or concerns?



*Thank you for also defining phrases in our vision. We'll discuss at a future meeting.*

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Participant Experience at Fall Community Stakeholder Meetings - CLUES



3.a.v

# Facilitated Activities



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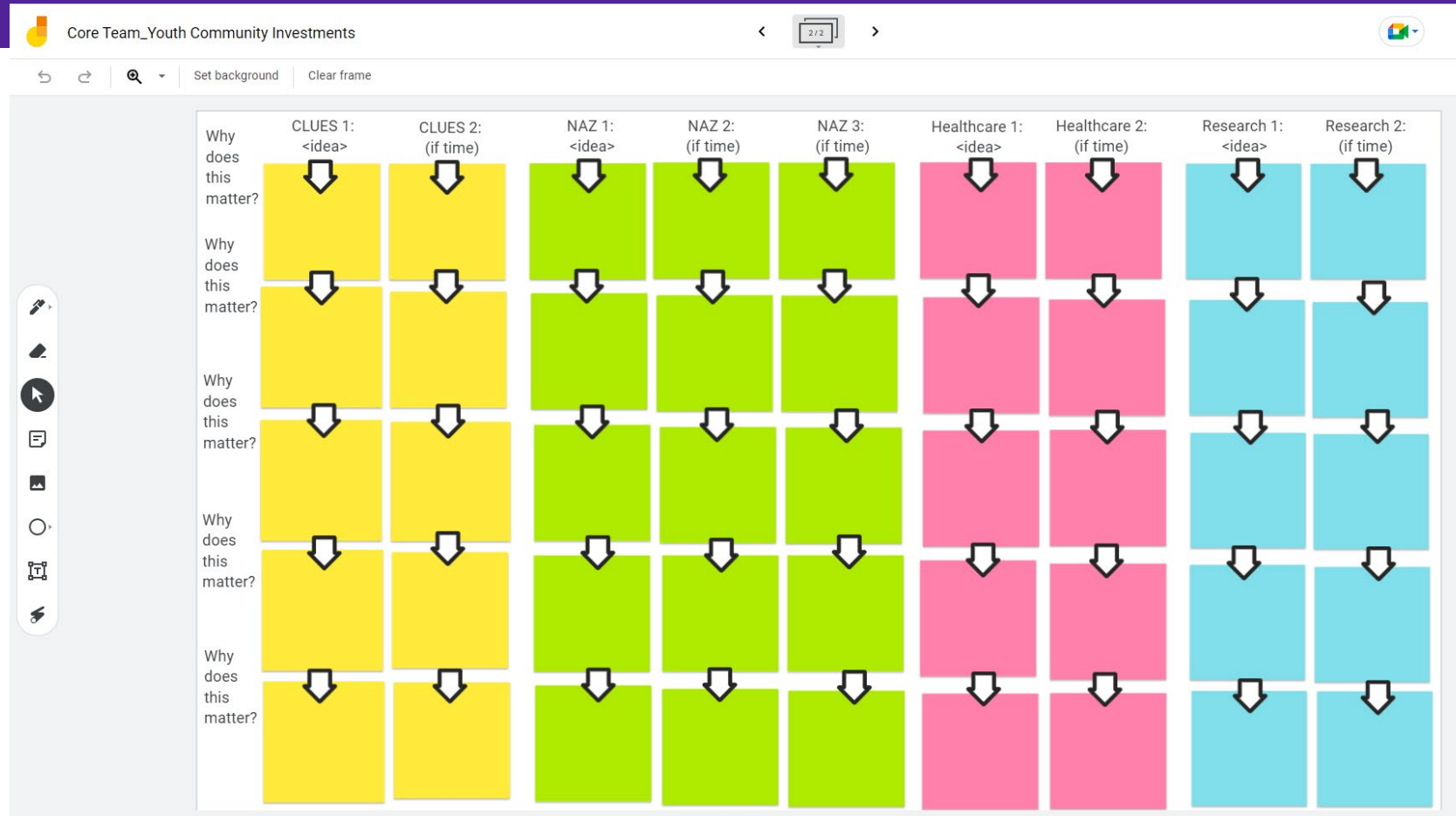
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Example 1:  
Creating Vision

# Small Group – Jamboard

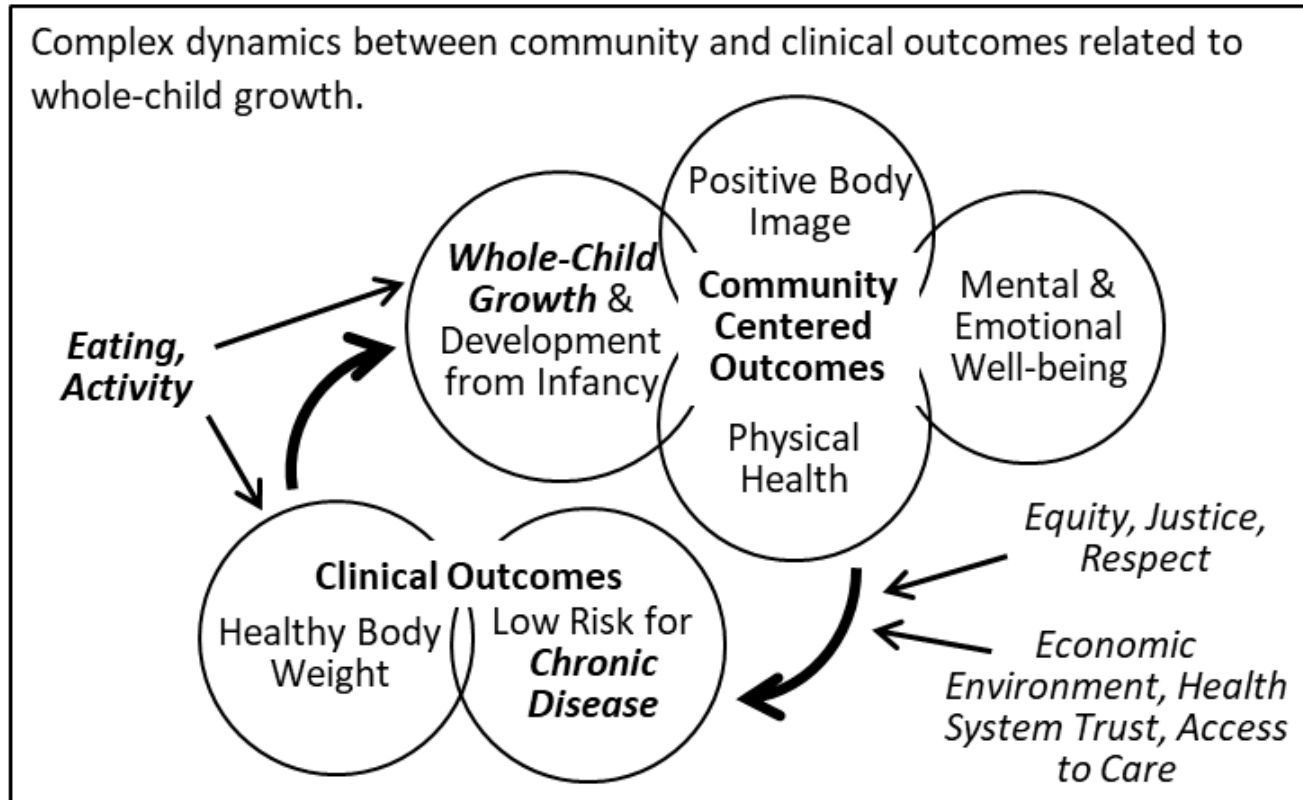


*Head to Jamboard for our next activity*

Example 1:  
Creating Vision

# Shared Vision Discussion

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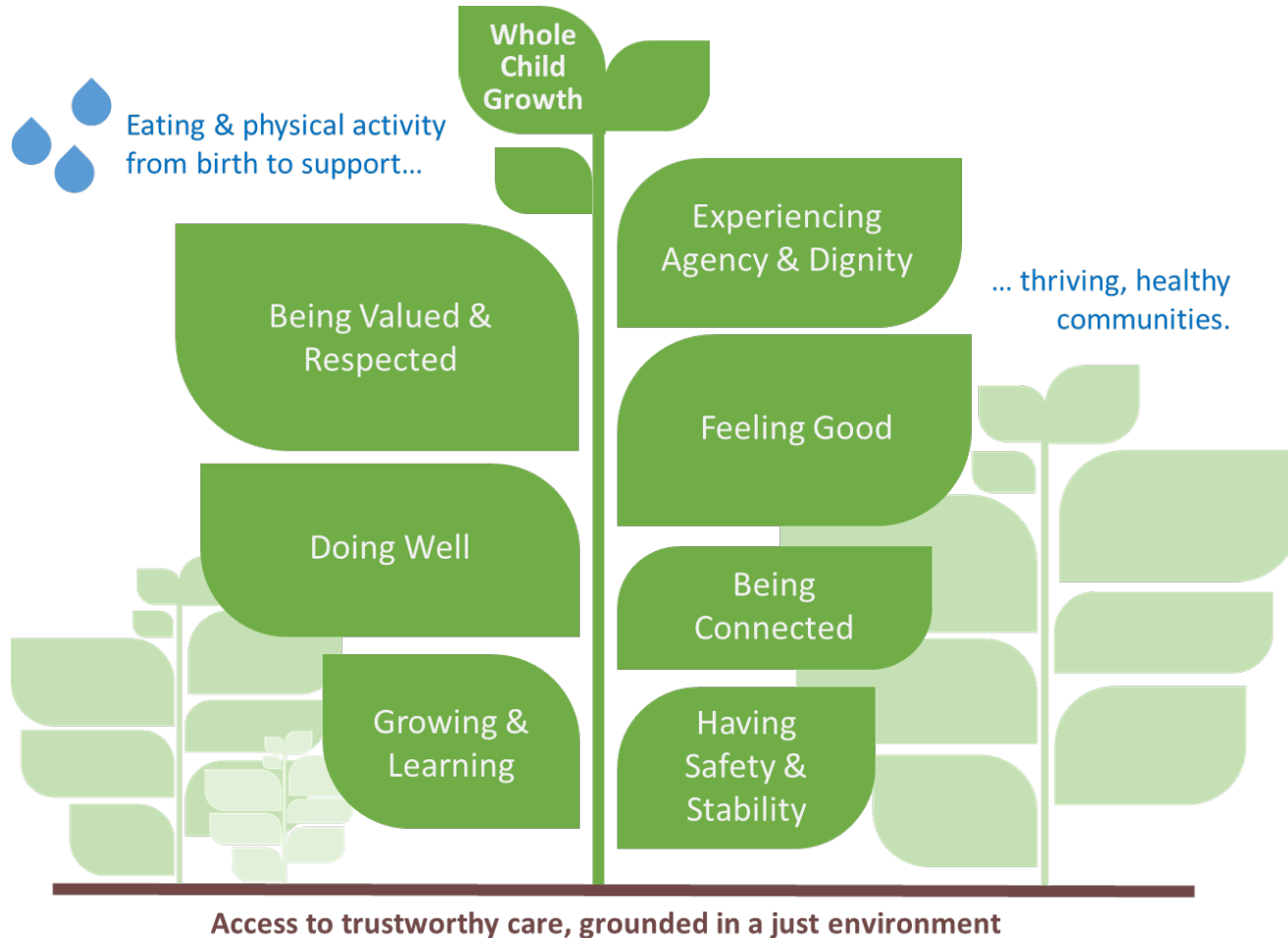


- Did you list any “clinical” outcomes?  
“Community-centered” outcomes?
- What are we missing?
- What do we want to change?

Example 1:  
Creating Vision

# Defining our Vision (Think-Pair-Share)

Example 2:  
Defining Vision



How would the **families you serve** talk about each of the leaves?

**How do you know** that a young child has each of these things?

(Pick 1-2 that feel most important to discuss)

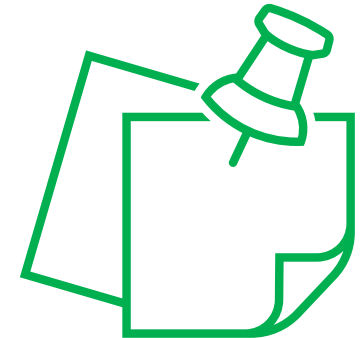
# Brainstorm

Example 3:  
Planning Work

Our goal is to **study & improve** whole child growth.

A research study tries to answer an important question. By asking questions, we can gather information and make something better.

What **questions** do you think we should try to answer to improve whole child growth?



# Whole Child Growth

Example 3:  
Planning Work



Eating, activity & early experiences support young people as they grow in a thriving, healthy community.



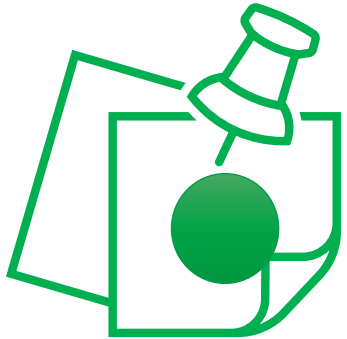
How can we help kids understand and make healthy food choices?

Rooted by supportive parents & families with access to trustworthy care.  
Grounded in culture & justice.

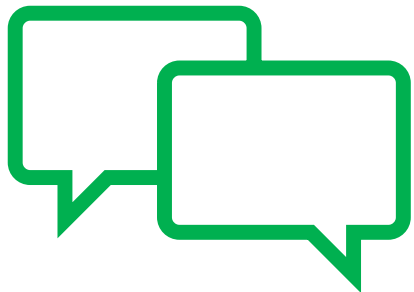
What is the impact of parents having access to culturally-specific parenting practices?

# Prioritize Ideas

Example 3:  
Planning Work



Which questions do you think are the **most important** to answer? Why?



Now, let's hear **research ideas** from each breakout room

- What stands out to you?
- What excites you?
- What do you want to know more about?



# Barriers, Facilitators, Resource Mapping

Return to your breakout room.

Example 3:  
Planning Work



What **challenges** would you anticipate in the next steps of this work?

What would **help** move this work forward? What strategic advice do you have for our Core Team?

What other organizations, people, or funders should we **partner with to answer these questions?**



# Healthcare & Research Stakeholder Meeting

**1. What outcomes related to whole child growth are currently measured in healthcare?**

**2. What is prioritized?**  
Copy & paste the star and move to priority outcome sticky notes

**Healthcare**

- Blood pressures
- asthma control
- Immunizations completion of well child visits. Some mental health measures but these are fairly new (Pediatrician)
- Birth weight (avoiding low and high) -- from a CNM / OB perspective
- Post partum depression rates for moms (pediatrician).
- height/weight, especially in infancy/early childhood
- hearing/vision screening
- Hemoglobin
- ages and stages, MCHAT
- STD testing
- OB perspective: Maternal outcomes in pregnancy.
- PHQ9-t scores
- Community Health: Access (starting w pre-natal)
- Lead exposure
- Nicotine use
- ages and stages Questionnaires, M-Chat
- Preterm birth rate
- Inms in MN are measured a couple of ways - Combo 10 which is in kids under 12 yrs and Combo 2 which is the teen measure. MN Community MN Community measures for kids.
- In healthcare, it's tough to get prioritization because a lot of health care reimbursement is directly tied to adult outcomes, not kids.
- Compliance with Well child visits, immunizations, asthma control and depression (pediatrician)

Example 4: Shared Work

What do you remember from this meeting?  
What stood out to you?

What went well?  
What would you like to change?

**What did you hear from our community that is the same as your original list?**

- Note things that are the same in green
- nutrition
- Support for parents (measured in Healthcare through post-partum depression assessment)

**What did you hear from our community that is different from your original list?**

- Note things that are different in orange
- Access
- trustworthy care
- celebrating children
- healthcare wants tangible measured outcomes
- love
- support for mothers
- natural foods
- Community responsive care is prioritized by individual clinicians but the resources to make these connections are limited which challenges care teams
- father / partners / caregiver education and support
- social drivers/determinants of health
- cultural grounding
- human experience / relationships between providers and caregivers