



## Sample Provider and Member Roles

---

*This description of roles is based on a document prepared by researchers at Miami of Ohio Scripps Gerontology Center, (academic research partners in the Sages in Every Setting project) for a provider partner. They used it to guide initial discussions about the possibility of creating an advisory board. The activities below were completed over approximately 6 months. Notes from debriefings with partners (at the end of this document) describe the actual experiences of the Vancrest Research Advisory Group.*

### **What do providers with research advisory boards do?**

1. Identify a facilitator (staff or volunteer) who participates in a facilitator training provided by [research partners] and reviews facilitation materials provided on the Sages in Every Setting [resource page](#). The facilitator can also prepare a biosketch which can be shared during recruitment and orientation of members. A template with instructions can be found at the Sages in Every Setting [resource page](#).
2. Observe a virtual meeting of another advisory board to get a sense of the process.
3. Invite residents to join an advisory board to provide feedback on research projects related to older adults living in nursing homes (individually and/or in an orientation session).
4. Secure commitment from 6-8 long stay residents of the nursing home and/or Assisted Living to attend research training and then monthly meetings.
5. Assist each resident member in the development of a biosketch. Option: Use support from students or volunteers. A template and instructions can be found at the Sages in Every Setting [resource page](#).
6. Schedule 60 minute monthly [or twice monthly] meetings at a time/day that is convenient for residents.
7. Identify options for technology that will make virtual presentations by researchers feasible and meaningful for members.
8. Remind members of each meeting and assist them in attending, as needed.
9. Facilitate the meetings with assistance from researchers and/or co-facilitators, as needed:
  - Meeting 1: introduction, training on research concepts and process, naming of the group, review/discuss mission/vision, members complete initial evaluation survey.
  - Meeting 2: review meeting objectives, introduce a new concept such as CER), invited researcher gives a 20 min presentation with 20-30 minutes of feedback from advisory board members (1<sup>st</sup> session of hands on research training).
  - Meeting 3: review meeting objectives, review research concepts and process or introduce a new concept, invited researcher gives a 20 min

*This project was funded by the Patient Centered Outcomes Research Institute through a Eugene Washington PCORI Engagement Award (2606-CJE).*

presentation with 20-30 minutes of feedback from advisory board members (2<sup>nd</sup> session of hands on research training).

- Meeting 4: review meeting objectives, invited researcher gives a 20 min presentation with 20-30 minutes of feedback from advisory board members (3<sup>rd</sup> session of hands on research training).
  - Meeting 5: Complete written post-test, debrief discussion which includes:
    - Qualitative evaluation of process/impact on members.
    - Discussion about the future of the group on topics such as mission/vision, meeting schedule, desired format (such as ongoing discussions of research topics vs. meeting on as needed basis).
10. Keep meeting notes, observations about members' level of engagement during meetings, and share feedback with research partners. Any of the suggested evaluation tools provided on the Sages in Every Setting [resource page](#) can be adapted to fit the setting/advisory board members.
  11. Record the concrete feedback that researchers were provided by the advisory board – what is the one thing that they take back and change in their proposal or research process?

### **What do advisory board members do?**

1. Participate in orientation.
2. Complete a biosketch.
3. Participate in all advisory board training/meetings.
4. Complete a brief evaluation survey during Meeting 1 and 5.
5. Provide feedback to researchers about their ideas.
6. Discuss their experience during Meeting 5.

*Actual Experiences: The facilitator and advisory board experimented with different ways of reinforcing knowledge and skills of members. They initially tried having refresher meetings within a week of each researcher presentation, during which they reviewed an upcoming researcher's biosketch and slides, along with any core research concepts. Eventually they settled on a preparation meeting the morning of the presentation. Members felt that if they met any earlier they had difficulty remembering what issues they wanted to bring up. Going over the researchers materials the same day allow them to think about what they wanted to contribute and remember more about the topic. Members also felt that when they were prepared the same day, the researcher could scale down the presentation. They were eager to get to discussion as soon as possible. For instance, a 5 minute presentation may be sufficient to jump start discussion. Discussion was guided by a staff facilitator at the site, as researchers asked their questions. All meetings with researchers were virtual. VanCrest partners felt it was especially important to have both a dedicated online facilitator and a facilitator in the room at the site. The role of an online facilitator was to troubleshoot and support the researcher's ability to interact in ways that residents could see and hear.*