



## Evaluation Tools for Members and Provider Sites

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This packet includes a variety of sample surveys, question guides and other evaluation tools for use with members and provider staff. Members can choose to complete surveys verbally during a group meeting, with a show of hands, or surveys can be self-administered in a paper format, depending on members' needs. Tools for providers are designed to foster conversation.

### Tools for Use with Members

Initial Evaluation Survey .....	2
(Pre-assessment of members' attitudes before research training -anticipated outcomes)	
Interim Evaluation Survey .....	3
(To capture members' experiences for quality improvement)	
Follow-up Evaluation Survey .....	5
(Post-assessment of member outcomes and satisfaction after completion of training)	
Other Sample Survey Questions.....	6
(Questions used by other Sages in Every Setting Advisory Boards, when adapting these tools)	
Evaluation Placement .....	7
(Format used during Bureau of Sages retreats with researchers /clinicians to assess members' experiences with specific co-learning activities)	
Engagement Observation Tool .....	8
(For documenting member and researcher engagement during meetings or events)	
Observational Notes Template .....	10
(For documenting member and researcher engagement during meetings or events)	
Assessing Members' Understanding of Their Role-Question Guide .....	12
(For qualitative assessment of members' understanding of the advisory board and their role)	
Process Evaluation of Research Advisory Board Development-Question Guide .....	13
(For qualitative assessment of member and provider sites for quality improvement)	
Impact on Members-Question Guide .....	14
(For qualitative assessment of impact on members)	
Impact on Provider Sites-Question Guide .....	15
(For qualitative assessment of impact on providers and facilitators)	

## Initial Evaluation Survey

Date: \_\_\_\_\_



Yes



Maybe



No

<b>1.</b> I am comfortable with talking to researchers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>2.</b> I believe I can learn about research.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>3.</b> I believe I can understand researchers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>4.</b> I trust that researchers can listen to us.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>5.</b> I trust that researchers can use our input.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Why did you become part of this group?**

**Comments:**

## Interim Evaluation Survey

Date: \_\_\_\_\_



Yes  
Most of  
the time



Maybe  
Some of  
the time



No  
Not yet

<b>What the advisory board is</b>			
<b>6.</b> I understand the purpose of the advisory board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>7.</b> I understand my role as a member.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Advisory board activities</b>			
<b>8.</b> I value socializing with the group.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>9.</b> I can follow the discussions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>10.</b> I am able to share my experiences or views.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>11.</b> I feel heard.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>12.</b> I am learning about research.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Experience with Researchers</b>			
<b>13.</b> I feel comfortable talking to researchers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>14.</b> I understand researchers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>15.</b> I trust that researchers will use our input.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**What else can we do to improve your ability to participate?**

**Other Comments or Suggestions:**

## Follow-up Evaluation & Satisfaction Survey

Date: \_\_\_\_\_



Yes



Maybe



No

- |  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
| 1. I am comfortable with talking to researchers. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. I believe I can learn about research.         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. I believe I can understand researchers.       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. I trust that researchers can listen to us.    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. I trust that researchers can use our input.   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. I was able to share my experiences or views.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. I felt heard.                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. I valued socializing with the group.          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. I was satisfied with this experience.         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. I would recommend this experience to others. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Comments (write on back of page):**

## Other Sample Survey Questions

Below are some additional questions and response options used by other advisory boards who chose to adapt or add to the suggested evaluation survey tools.

**Please indicate how much do you agree or disagree with the following statements about your experience in the Bureau training.**

*[Response options: strongly agree, agree, neutral, disagree, strongly disagree]*

- I feel prepared to discuss research. (Initial Evaluation)
- I believe that research can impact the lives of older adults. (Initial Evaluation)
- The research discussions were interesting. (Follow-up Evaluation)
- I felt my personal experiences were valued by the researcher(s) who came. (Follow-up Evaluation)
- I felt respected. (Follow-up Evaluation)
- I had the opportunity to contribute to research in a meaningful way. (Follow-up Evaluation)
- I feel less stigma regarding my condition after participating in this experience. (Follow-up Evaluation)
- Going through this experience gave me a sense of accomplishment. (Follow-up Evaluation)
- I feel more in control of my condition after participating in this experience. (Follow-up Evaluation)
- I felt like part of a team. (Follow-up Evaluation)
- The scheduled time for the meeting was satisfactory. (Follow-up Evaluation)
- I found this experience too challenging. (Follow-up Evaluation)

**Overall, how satisfied were you with the Bureau experience?** *[Response options: very satisfied, satisfied, dissatisfied, very dissatisfied]*

**Would you recommend participating in the Bureau to others?** *Yes/No*  
**Why or why not?**

**Please provide additional comments on what this experience meant to you:**

**How often would you be willing to meet with this group in the future?**

**Are there ways we could improve this experience?**

**What advice would you give to other organizations who may develop similar bureaus?** *If asked in person, prompts can include advice about:*

- *Facilitation of meetings*
- *Research training*
- *Researcher presentations*
- *How to keep the group going*

Evaluation Placemat

Other thoughts?



I felt HEARD



Name: \_\_\_\_\_

[PHOTO]

WHAT DID YOU THINK?



I LEARNED Something



Insert activity being evaluated

There was TEAMWORK or UNITY



This was too CHALLENGING



Bureau of Soges • Together, at the table •



## Using the Engagement Observation Tool

### Definitions of Observation Domains

The Observation Tool on the next page uses the following definitions:

Engagement-Peers: One on one or group conversations among peers (e.g., member/member or researcher/researcher); nonverbal gestures or contact; expressed interest in personal experiences of others

Engagement-Others: One on one or group conversations among non-peers (e.g. member/research stakeholders); nonverbal gestures or contact; expressed interest in personal experiences of others

Attention: Behaviors that suggest participants are focused on the activity at hand; relevant questions or contributions posed to presenters, research coaches, or other participants; nonverbal expressions such as nodding, smiles, thumbs up or other gestures

Trust/Respect: Behaviors that suggest rapport with others or comfort in the social setting; participants contributions are recognized and responded to by others; evidence of two way dialogue; explicit statements of trust or “belief” in results of meetings or activities

Suggestions for using the tool (see next page):

- Use the observation form to characterize the nature of engagement for advisory board members and/or others who participate in a meeting or other event.
- The form can be used to characterize engagement for a single meeting/event or to reflect on engagement over a period of time (e.g., multiple activities with members over a quarter).
- Use the prompts at the end of the form to add more descriptive observations to identify specific areas of success or possible challenges.
- Periodically review the observation data to identify areas for improving advisory board processes.

**Date:** \_\_\_\_\_ **Observer:** \_\_\_\_\_

**Type of Event (check one):**

- Regular member meeting—How many members attended? \_\_\_\_\_  
How many guests (if present)? \_\_\_\_\_
- Review Meeting with researcher(s)—how many researchers presented? \_\_\_\_\_
- General observations from \_\_\_\_\_ (date) to \_\_\_\_\_ (date)
- Observation of other activity (e.g. an annual event),  
explain: \_\_\_\_\_

(Check one box in each row.)

About how many members demonstrated each of the following...	Nearly All	Over half	About half	A Few	None
<b>Engagement with peers</b> (members)					
<b>Engagement with others</b> (facilitators and guest observers, if present)					
<b>Attention</b>					
<b>Trust/Respect</b>					
If researchers present their work...	Nearly all of the time	Some of the time	Hardly at all		
<b>To what degree did the researcher(s) talk to or ask questions of members?</b>					
<b>To what degree did the researcher(s) attentively listen to members?</b>					
<b>Describe researcher behaviors that demonstrated or did not demonstrate trust or respect:</b>					

**What challenges did you observe around facilitating engagement?**

**What went well? What worked?**

**What strategies, factors, or conditions might explain the low or high levels of engagement?**

**Other comments or suggestions to improve engagement levels for members or researchers:**

## Observational Notes Template

This template for taking observational notes can be used instead of the Engagement Observation Tool.

**Observer:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### Advisory Board Attendees

Members:

Facilitator(s):

Researcher(s):

Observer(s):

#### **Describe the overall balance of discussion/contributions:**

*Such as who contributed more or less, balance of talking by facilitator/others vs. members*

#### **Describe members' level of attention:**

*Such as body language such as nodding, smiles, thumbs up or eye contact, asking relevant questions, making relevant contributions vs. doing something else, sleeping, leaving the meeting, not speaking or asking questions*

#### **Describe how members engaged with peers:**

*Such as side conversations, interest in personal experiences of others, helping other members be heard*

#### **Describe evidence of trust or respect:**

*Such as interest in what others say, validation of differing opinions, expressions of empathy, explicit statements about respecting or trusting others*

#### **Describe researcher(s)' level of attention (if present):**

*Such as body language such as nodding, smiles, consistent eye contact, active listening vs. arriving late, doing something else during the meeting, primarily lecturing, not asking members any questions*

**Describe how researchers engaged with members (if present):**

*Such as checking in with members to see if they understand, defining key terms, asking for concrete input, expressing interest in views/experiences, connecting those experiences to research topic, stating value of input or how input will be used VS. primarily lecturing, not asking members questions, not summarizing what they have learned from members*

**What challenges did you observe during the meeting?**

*Such as distractions, technology issues, negative interactions, challenging group dynamics*

**What went well? What facilitation strategies worked?**

**What conditions, factors or strategies might explain higher or lower level of engagement?**

**Other comments or suggestions to improve engagement or facilitation:**

**Summary of meeting (can serve as minutes):**

*For Member meetings: Outline main topics or issues; summarize member's contributions under each topic.*

*For Research presentations: Outline key aspects of the presentation; summarize members' comments; provide examples of their concrete input; document researchers' statements about the value of the session, or how they will use the input.*

## **Assessing Members' Understanding of Their Role**

### **Question Guide**

Below are suggested open-ended questions to ask members at various stages of the advisory board development process to assess their understanding of Research and Advisory Boards. Members' responses may be helpful for monitoring changes in attitudes about their role as research advisors, identifying preferences or needs that could inform engagement strategies, and identifying other potential outcomes to track. Questions should be adapted to fit the setting and characteristics of advisory board members.

#### **When the Advisory Board is Starting Up**

As we get started we'd appreciate learning about your views of research...

- What do you think about research? What words or phrases come to mind?
- Have you ever been involved in any type of research, in any way? If so, how?
- How do you feel about talking with researchers?
- How do you feel about representing the voice of other people who receive care like you?
- What do you hope to gain from being part of this group?
- What are your biggest concerns about being part of this group?
- Do you have any questions about your role or what's next?

#### **After Research Training and Meeting with Researchers**

Now that you have been part of the advisory board for some time....

- How do you feel about research?
- How would you describe your role as a member of this group?
- How would you describe the purpose of this group to others?
- How do you feel about working with the other members in this group?
- What would you tell other people about this group?
- What do you think researchers can learn from this group?

## **Process Evaluation of Research Advisory Board Development**

### **Question Guide**

We encourage facilitators/provider staff to stop and reflect on the how the research advisory board development is working or not working by seeking feedback from those involved. This type of information can be used to improve the experiences of everyone involved (e.g., members, facilitators, support staff, researchers. Questions should be adapted to fit the setting and characteristics of advisory board members.

#### **Advisory Board Members:**

- What do you like the most about this [name of advisory board]?
- What do you like least?
- Do you have any suggestions for improving the advisory board?
- Is there anything else you need to make it easier for you to participate in meetings or discussions?
- How do you feel about working with the other members in this group?
- Do you feel prepared to talk to researchers? Why or why not?
- What else do you need to learn?
- Do you have any concerns or suggestions for the future of this group?

#### **Provider Staff:**

- What is your understanding of the purpose of this advisory board?
- Is there anything else you'd like to know about it?
- Do we need to change anything to help you support members or get them to meetings? What's working/not working?
- Have you heard any complaints from members about their experience on the board? If yes, please explain.
- Do you have any concerns about members or the advisory board program?
- Do you have any other suggestions?

#### **Facilitators:**

- How are recruitment and orientation activities working or not working for new members?
- How are meeting facilitation techniques working or not working?
- How are we accommodating members' needs?
- What else might they need to participate in discussions?
- Is there anything we could be doing differently?

## **Impact on Members**

### **Question Guide**

Below are suggested questions about the impact of the experience on members. These can be used to guide interviews, discussions or conversations with Members near the end of their research training.

- What did you like the most about the Bureau? What did you like least?
- What did you learn about research?
- How do you feel about research, now that you have been part of this group?
- Did you feel prepared to talk to researchers? (explore confidence in ability to talk to researchers)
- What helped you be comfortable sharing your experience with researchers?
- What do you think of how the researchers interacted with the group? (explore perceptions of respect and trust)
- How has being a member benefited you? (explore social, intellectual or other benefits)
- Overall, how satisfied are you with your experience on the advisory board?
- How do you feel about representing the voice of other older adults?
- What do you think researchers can learn from this group?
- What would you tell others about this experience?
- Do you have any concerns or suggestions for the future of the advisory board?



## **Impact on Provider Staff and Facilitators**

### **Question Guide**

For provider staff:

- What did you expect the Bureau would be like? What surprised you?
- What have members told you about their experiences? (elicit examples)
- How has your perception of members or residents changed?
- What else did you learn from this experience?
- Has the Bureau had any impact on the organization? (elicit examples)
- Would you recommend starting similar groups at other provider organization? Why or why not?

For facilitators:

- How have your assumptions about members changed?
- What else did you learn from this experience? How else did you benefit?
- Would you recommend starting similar groups elsewhere? Why or Why not?
- In hindsight, is there anything that could have been done differently?