



Process Evaluation Questions for Sustainability

This is a checklist of questions to consider for sustaining research advisory boards made up of older adults receiving Long Term Services and Support (LTSS). It is based on learning from the Bureau of Sages at CJE SeniorLife and the research advisory boards created through the Sages in Every Setting project. Examples from research advisory boards are listed below each item. Providers are the LTSS or other organizations that host an advisory board. Academic partners support provider's with developing an advisory board and connecting them to researchers.

Did the advisory board develop mission and vision statements?

Engaging members in this process can help build both shared understanding of their role, as well as commitment to the advisory board.

Bureau of Sages: Members participated in brainstorming over several meetings to draft and finalize a mission and vision, as well as values. This process is described in the 'Facilitation Guides, Agendas and Training Materials for Members'. Bureau members periodically revisit their mission, vision and values, which are also used to orient new members and facilitators.

Examples from Sages in Every Setting: Research advisory boards were provided with the original mission and vision of the Bureau of Sages. Most chose to adopt the same statements.

What type of advisory board structure is feasible in this setting?

Each advisory board develops a meeting structure and processes for engagement. Partners must be mindful of what can realistically be sustained at the provider site.

Bureau of Sages: Nursing home resident members chose to meet twice every month as a group. When there is not a researcher presenting, the group meets to discuss research articles, topics, and concepts. These meetings serve as ongoing training and include peer mentoring for new members. Members use an egalitarian, discussion-based decision-making model; there is no chair person. The facilitator brings issues that need attention to the group for discussion. Members meet with researchers in person or virtually via zoom. They occasionally meet with the Virtual Senior Center Bureau (older adults living at home with LTSS in Chicago and NYC).

Examples from Sages in Every Setting: Two research advisory boards follow a similar model as the Bureau of Sages, meeting regularly with facilitator(s) to participate in discussions about research, in between engagements with researchers. Another group only meets to give input to researchers. They meet the day of to review the researcher's biosketch and presentation materials and to begin coming up with ideas so that they feel prepared for discussion with the researcher later in the day.

All but one advisory board has provided feedback to researchers in virtual meetings, using Zoom, WebEx, a "Virtual Senior Center," or similar platforms, usually via an invitation sent by researchers. The on-site facilitator or provider staff set up the hardware and any assistive tools (such as additional microphones) for virtual meetings.

What roles and responsibilities are realistic?

Meeting structure has implications for roles and workload. Using volunteers for some roles is feasible, being mindful of any resource limitations or barriers such as staff/volunteer turnover, a common experience in LTSS. Partners can support providers with careful use of virtual and in person time.

Bureau of Sages: CJE research staff have regularly communicated with nursing home staff about the Bureau of Sages and potential research guests. They periodically explain the purpose of the Bureau to onboarding administrative or management staff. A Life Enrichment staff member at the facility is responsible for notifying nursing staff of residents meeting schedule, bringing residents to meetings, helping them with their needs, or designating someone to do so. That staff member also often sits in on Bureau meetings. A volunteer, identified by the Project Lead and trained by CJE research staff, has stepped up to facilitate the Bureau. Facilitators have also been recruited through CJE's volunteer department by the Project lead. CJE's research staff co-facilitate meetings with researchers or sometime assist during regular meetings.

Examples from Sages in Every Setting: Several advisory boards have used volunteers as lead or co-facilitators, identified by the provider site or by CJE through student internship programs, service learning programs, and/or word of mouth. One advisory board is facilitated by the facility's Activities Director. Researchers often co-facilitate discussions with members. Several advisory boards found that having an online coordinator or facilitator helped virtual meetings run more smoothly, especially in the event of inevitable technology challenges.

What materials or guides are needed to institutionalize processes?

To address the likelihood of turnover in members, facilitators and other roles, advisory boards are more sustainable if they have guides and other materials that can be used as a “manual.”

Bureau of Sages: Project staff developed a manual that serves as a guide for sustaining the Bureau as a permanent entity at CJE SeniorLife and as a tool for orienting facilitators or staff. It describes the Bureau of Sages history, purpose, roles, responsibilities, guidelines and procedures, including criteria for recruiting members and how to work with researchers. CJE research staff trains facilitators using the manual and online resources from Sages in Every Setting. They also give facilitators opportunities to observe an existing advisory board (in person or virtually). The Bureau provides presenting researchers with materials to prepare for meeting with members (see online resources).

Examples from Sages in Every Setting: Advisory boards used Sages in Every Setting’s resources for recruiting and training facilitators and members and can continue to use these materials to help sustain advisory boards. One advisory board facilitator prepared a “job description” for the facilitator role, in anticipation of needing to recruit facilitators in the future, based on materials shared from the Bureau of Sages manual. CJE research staff also provided other boards’ facilitators with opportunities to observe the Virtual Senior Center Bureau of Sages. Peer mentoring or connecting with facilitators from other research advisory boards is also being explored as an option. Advisory boards have also used online resources for researchers who come to their board.

How will partnerships between providers and research institutions/groups be maintained?

Research Advisory Boards need the support of an organization that is familiar with the research world to help them connect to researchers. Ideally, administrative support within an academic/research institution can ensure that there are resources and staff time to do the work of connecting researchers to advisory boards.

Bureau of Sages: Research staff at CJE reach out to researchers and respond to researcher requests, and then provides the researcher with guidelines and materials for researchers (available on the resource page). When needed, CJE research staff provide advice to researchers about how researcher’s presentation content or materials will be best received by Bureau members. Research staff also present CJE research projects to the Bureau for input.

Examples from Sages in Every Setting: Partners of the Sages in Every setting project reached out to identify researchers and connected them to an advisory board. One volunteer facilitator, a Ph.D. candidate/university instructor, also reaches out to researchers through personal networks. Efforts are underway to connect some of the advisory boards to academic institutions that are near them.

How will participating stakeholders provide regular feedback?

Research Advisory Boards are likely to evolve with changing membership and conditions in the setting. Seeking ongoing feedback from everyone involved, including researchers, allows for adjustment and quality improvement that can help to sustain a board.

Bureau of Sages: Researchers at CJE SeniorLife periodically seek feedback from Bureau members as part of regular meetings. During the first two years, process evaluation sought input from all stakeholders (members, provider staff, project staff, researchers and clinicians). It included surveys, evaluation of specific activities during retreats with researchers, brief open-ended interviews, and group debriefings.

Examples from Sages in Every Setting: Other advisory boards have used some of the suggested evaluation tools provided by Sages in Every Setting to seek stakeholder feedback, such as short surveys of members and debriefings with members and Provider staff. They also asked most researchers to complete pre- and post-engagement surveys online.