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| **PRE-PLANNING** | |
| 1. Application filed: Brief description of project, population of interest, nature of project challenge |  |
| 1. Confirm SE Studio is correct approach for researcher’s focus |  |
| 1. Identify facilitator based on relevant stakeholder characteristics/demographics |  |
| 1. Schedule planning meeting and share SE Studio FAQ |  |
| **Planning Meeting with Researcher/Researcher Team** | |
| 1. PI, navigator, and facilitator meet together |  |
| 1. SE Studio process is explained/clarified |  |
| 1. SE Studio ground rules for research team are explained |  |
| 1. Questions to be posed to stakeholder participants are drafted (2 to 3 max; open-ended) |  |
| 1. Characteristics of the stakeholder expert panel are defined |  |
| 1. Stakeholder experts are coached on effective communication |  |
| 1. Study presentation template with guidelines for completion (provided to researcher) |  |
| 1. Identify three (4) possible dates for SE Studio (Breakfast, Lunch, Afternoon, Dinner) |  |
| **Stakeholder studio Team** | |
| 1. Identify neutral facilitator |  |
| 1. Confirm stakeholder/community navigator’s availability |  |
| 1. Identify support staff to help with recruitment, logistics |  |
| 1. Develop facilitators guide (3 main questions and probes) |  |
| 1. Vet researcher’s presentation |  |
| 1. Researcher and facilitator review final researcher’s presentation and facilitator’s guide |  |
| 1. Recruit and screen stakeholder participants for expert panel |  |
| 1. Review compensation expectations (length of time to receive compensation, type of gift card, etc.) |  |
| **COMMUNITY EXPERTS** | |
| 1. Ensure no relationship with researcher/research team |  |
| 1. Affirm experts representation/membership to stakeholder group of interest |  |
| 1. Provide orientation to SE Studio and explain compensation |  |
| 1. Provide study materials to stakeholder experts for review, in advance if necessary |  |
| 1. Experts complete application (for future SE Studio opportunities) |  |
| **LOGISTICS** | |
| 1. Poll experts for optimal data and location of SE Studio |  |
| 1. Secure meeting room at location with convenient parking and/or transit options |  |
| 1. Ensure access to computer, projector and power cords |  |
| 1. Ensure digital access to presentation (thumb drive, internet) |  |
| 1. Order food order, considering dietary restrictions or needs (for experts and research team) |  |
| 1. Print forms: Sign-in sheet, paperwork for expert payment, evaluation surveys, expert comment form |  |
| 1. If needed, print research materials for review (flyers, brochures, surveys) |  |
| 1. Gather supplies (markers, pens, flip charts, name tags) |  |
| 1. Gift cards for payment, if used |  |
| 1. Confirm time and location with researcher and experts, including directions, parking, contact info |  |

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| **STAKEHOLDER STUDIO EVENT** | |
| 1. SE Studio team present |  |
| 1. No more than two members of research team in attendance |  |
| 1. Approx. 8 to 10 expert panel members in attendance |  |
| 1. Welcome and instructions |  |
| 1. Overview of ground rules: First names, everyone sit at table, no wrong answers, different opinions are encouraged, everyone on panel participants, do not talk over others; Housekeeping: location of restrooms, turn of cell phones and devices |  |
| 1. 10 minute presentation by PI, followed by very brief Q & A for clarification |  |
| 1. Facilitator uses facilitation guide to direct conversation |  |
| 1. Facilitation techniques used to balance power, include all voices, empower experts, validate experts’ comments, stay on focus |  |
| 1. Navigator takes notes on flip charts, visible to all |  |
| 1. Facilitator reviews expert responses, recommendations for affirmation, validation |  |
| 1. Experts complete written comments form |  |
| 1. Evaluations completed by researcher and experts |  |
| 1. Compensation/gift cards expended, signed for |  |
| **FOLLOW UP** | |
| 1. Send ‘Thank you’ to stakeholder experts |  |
| 1. Make sure payment is sent to experts in timely manner, if gift cards are not used |  |
| 1. Type up summary of SE Studio discourse for researcher (includes expert comments plus specific recommendations) |  |
| 1. Contact researcher if additional information or assistance with recommendations is needed |  |
| 1. Report back to experts on actions/changes made as a result of their input (may take 3 to 6 months or more, depending on project) |  |
| **FACILITATION** | |
| 1. Use opener to engage each expert at the beginning, by going around the room and asking: “What are your initial thoughts about the project?” |  |
| 1. Call each person by their name to establish rapport as opposed to general use of ‘you’ |  |
| 1. Don’t ask close-ended (yes/no) questions |  |
| 1. Ask experts to elaborate on short answers; avoid interjecting personal experiences and opinions |  |
| 1. Use body positioning to redirect conversation or address dominate experts |  |
| 1. Limit researcher/staff commentary |  |
| 1. Refocus experts as needed by restating/rewording question |  |
| 1. Create ‘parking lot’ for issues that are not specific to discussion |  |
| 1. Give time reminders to move discussion along, as needed |  |
| 1. Be comfortable with silences to give experts time to think and respond |  |
| **RECORDKEEPING** | |
| 1. Enter new experts in stakeholder data base |  |
| 1. Process evaluation surveys |  |
| 1. Update SE Studio record data database |  |