Section 3: Working Together

"Coming together is a beginning; keeping together is progress; ***working together is success****."*
-Henry Ford

Up until this point you have been thinking about the purpose of your engagement group(s), the infrastructure needed to get the effort launched, who to invite to participate, and how to recruit them. Once these pieces are together, you can turn your attention to ***how*** you will work together. Although the content of your meetings will vary, there are practices and processes you can create to facilitate engagement. In this section we present recommendations from a number of different investigators who have shared their experiences with running successful engagement groups. When available, we provide links to tools and resources that they have developed to support the planning and running of meaningful meetings.

Preparing for Meetings	Running Effective Meetings	Post-Meeting Follow Up	Keeping Members Engaged

3.1 Preparing for Meetings

There is a lot of work that goes in to planning for engagement group meetings. You will likely need to begin planning efforts at least one month in advance of a meeting. A meeting checklist is available in the resources section of the Toolkit, but key steps include:

Set agenda:
The purpose of your engagement group will inform the type of activities that are created for each meeting. For example, if the purpose of your group is to inform specific research studies then you will want to reach out to investigators at your Center to identify individuals who are ready and willing to discuss their research with the group. If the purpose of your group is to inform Center level strategic planning, you will want to talk with the leadership team or focus area leads to identify needs for input. Samples are available in **Section 6.5-Templates for Abstracts, Agendas and Notes/Minutes**.

Prepare presenters: It is important to assure that presenters are prepared for their meeting with the engagement group. First time presenters may need some coaching on their presentation, including the scope of questions, order of material being presented, language, etc. You may want to ask them to outline 1-2 goals for the meeting or identify 2-3 questions they'd like to have the group address. In other words, what would a successful presentation and discussion look like to them? Then discuss how best to engage members in a conversation that would meet these goals. Some engagement group leads have created templates or specific instructions for presenters to help guide the development of their presentations (see example presentation formats in Resources).

Logistics: Assure there is a large enough meeting space available with the appropriate equipment that is needed for the meeting. You may also need to assure that arrangements have been made for transportation and/or parking. Also consider whether or not any members have special needs that can be accommodated. Send out any directions or instructions for getting to the meeting (including access to buildings and secure areas) with the agenda.

TIP: Recommendations for Meeting Agendas

- Most meetings are 1.5-2 hours in length. It is important to structure meetings so that there is ample time for discussion on each key topic. Do not try to pack in too many items on your agenda.
- Build time for relationship building into the beginning of each meeting. This can include offering food and beverages prior to the meeting, so that people can come a little early and socialize. Groups often tend to socialize at the end of a meeting, so plan accordingly. It can be disappointing to get rushed out of a conference room after an energized encounter.
- Have an opening exercise that allows the facilitator to get a sense of the energy of the group and to get engaged in the meeting. An opening activity can be as simple as a question about how everyone is feeling or sharing an interesting observation related to health services.
- Report back on the outcome of the prior meeting. When possible, share how the group's input was used.
- The majority of your time will be focused on one or two presentations or topics for consideration. You want to allow at least 30-45 minutes for main presentations.
- Conclude with a summary of what was learned during the meeting. Summarize key take away points and discuss any action items for the next meeting.

Send out Agenda: Approximately one week before a meeting, send out the agenda, materials, directions or instructions for getting to the meeting and any other important materials to engagement group members, presenters and other meeting attendees. You are allowed to email these materials to members who have provided their email addresses. If this is not the best way to get materials to a member or attendee, you can mail them. Note that mail may take longer to reach someone, so incorporate this into your timeline.

Other Recommendations

- Set a yearly meeting schedule for your engagement group. This helps participants to get the meetings into their schedules early. It also helps research team members identify meetings that are appropriate for their needs.
- Presenters are often scheduled months in advance depending on how often a group meets. Other times an investigator may need feedback on a tight timeline, so scheduling takes a bit of practice and a bit of patience.
- Some groups opt to not meet during summer months and avoid meeting during holiday weeks.

3.2 Running Effective Meetings

Good facilitation is essential for running effective, engaging meetings. Facilitators help ensure that meetings are well planned and carried out. They also function as a liaison between Engagement Group members and researchers, helping to bridge conversations when needed, to support communication during and after meetings, and to provide feedback to support on-going collaboration and relationship building. A skilled facilitator can diffuse tension and be the one to ask for clarification when needed.

3.2.1 Qualities of good facilitators

Many of the current Engagement Groups within the VA are moderated by a facilitator. Some Centers have meetings facilitated by a VA employee, most often a Veteran Engagement Champion for the site. Others have opted to have a non-VA employee contracted specifically for meeting facilitation. Regardless of how you set up your meeting facilitation, there are certain qualities inherent in good facilitators and good facilitation techniques to consider.

Organized: Able to prepare in advance of meetings or other VEG activities, including but not limited to setting agendas, gathering information for distribution, researching topics or questions of interests, etc.

Good Listener: Takes time to listen to the perspectives and ideas of the Veterans; actively engaged with eye contact when someone is speaking.

Good synthesizer: Able to pull together and synthesize information shared by individuals and groups in real time. Listens for underlying meanings, identifies themes, uses Veterans' own words in summaries.

Flexible: Able to adjust processes as needed, including agendas and any logistical matters, based on group consensus or input.

Patient: Mindful of certain actions and decision-making along the process of facilitating a VEG that may require time and not be immediate in outcome.

Objective: Able to be neutral, unbiased in providing information for decision-making among the group or at the individual-level. Facilitators understand their role and ability to neutralize natural power imbalance initially present between researcher and Veterans and pull in outside expertise when needed.

Passionate: Has a desire for helping to empower Veterans to have an active voice in issues affecting their fellow Veterans. Should have an authentic belief that Veterans hold as much agency and expertise as the "experts" that come in to present.

Committed: Is committed to elevating the Veteran voice along the research process. Often means re-directing the conversation back to the board to prioritize the Veteran voice. Consider steering major questions back to the board for their input. Ask for permission to re-write or add to cultural norms. If a Veteran suggests a way to proceed during facilitation, follow their lead.

Interpersonal: Is personable with the ability to build relationships quickly with Veterans. Able to host a space where the Veterans can make a personal connection.

3.2.2 Engaging Veterans in conversation

Creating an engaging, interactive dialogue between researchers and Engagement Group members requires attention to both ***structure*** and ***process***. Structure and consistency are especially important for Veterans. Knowing what to expect and having a regular routine that is followed in each meeting is aligned with a military culture that is still meaningful to many Veterans. Feedback indicates the importance of an agenda and a preference for knowing what to expect.

TIP

Establish structure for each meeting to help members prepare for their participation

- Send Engagement Group members all meeting materials one week before every meeting so they can review them at their own pace and come fully prepared to discuss the topics.
- Discuss expectations for engagement in meeting discussions and put these expectations in writing.
- Have a consistent structure to meeting agendas, so members know what to expect during meetings.
- When researchers (or others) come to present their ideas to the group, encourage them to begin with ***why*** the topic matters. This will help group members connect and engage with the topic that they have come prepared to discuss.

In addition to establishing good structures that support engagement goals, it is important to think about the types of meeting activities that will generate conversation and elicit the input that is desired. By and large, Engagement Group members are not coming to meetings to listen to presentations about research studies. They are coming to provide consultation to researchers – to share their experiences and contribute their ideas to inform research studies. Asking questions in a way that engagement group members can respond to is an important consideration.

Ideas for Meeting Activities (Process)

There are many different approaches to generating conversation once you are together (process). Some common meeting activities include:

- A presentation of material by the researchers that includes a full group question and answer and discussion (good for getting feedback on specific ideas).
- A brief presentation followed by small group discussions and then a larger group discussion (good for brainstorming, especially if you have a large group).
- An interactive process mapping or brainstorming exercise around the topic (good for identifying gaps or areas for improvement).

Two key points to keep in mind as you develop meeting activities. First, it may take more time for engagement group members to understand certain topics than others. Engaging them sometimes requires researchers, liaisons and facilitators to slow down until everyone is at the same place with the process. Second, it is important to remember that the purpose of the meeting is to hear from engagement group members. Continuously monitor the room to assess levels of participation in the conversation and adjust your approach as needed. This is an opportunity to think of three ways to explain something; not everyone will understand a point the first time it is presented or a question the first time it is asked.

3.2.3 Role of facilitators during meeting

The meeting facilitator is responsible for setting the tone of the meeting and creating a safe, productive space for all participants to share their thoughts and opinions.

Preparation: Prior to each meeting, the facilitator should ensure that the room is set up in a way that facilitates interaction with others. Tables set up in a circle or oval shape configuration is recommended. Arrange seating so that researchers and Engagement Group members sit together and engage as equals. Other pre-meeting logistics include ensuring that agendas and other materials for review are available, technology is operational, and food and beverages are set up.

Meeting: During the meeting, the Facilitator serves as an advocate for Engagement Group members. Physical location of the Facilitator is important; the facilitator should sit near any Veterans that are hard of hearing while keeping a view of all the Veterans to watch their body language. The facilitator should not be standing and presenting but sitting down with the Veterans as an ally. It is recommended that research team members also sit with Engagement Group members to create a collaborative working meeting. Other recommendations for meeting facilitation are noted in the green Tip box on the next page.

TIP

Recommendations for Running Meetings

- Check in with Veterans at the start of the meeting to gauge initial feelings and questions about that meeting's presentation.
- Check in with researcher on what questions they would like answered if their initial ask was too general or needs reframing due to Veteran confusion.
- Scan/read the room to ensure that Veterans feel comfortable and can ask the questions they need to get to a place of understanding around the subject material being presented.
- Give non-verbal cues to individuals that may have gone off topic for too long to keep the meeting moving. Alternatively, interrupt the individual, acknowledge the importance of their discussion, and re-direct the meeting back on task to respect everyone's time. Upon group consensus and interest, schedule future time for the discussion to continue.
- Check time to generally adhere to movement through the agenda while ensuring there is understanding of subject material before moving along.
- Give Veterans the option to continue to provide thoughts and feedback post-meeting via email or phone should the group run out of time.
- Be prepared to be flexible with the agenda. If Veterans wish to continue discussion on an issue or if something new comes up that is not on the agenda, pause the meeting and discuss the best course of action for proceeding. There may be times when it is not possible to alter the agenda. Honor their interests by suggesting the topic be placed on the following meeting agenda.
- Ensure the researcher's questions are addressed by the group.
- Record themes and Veterans' recommendations/feedback throughout the meeting.
- Determine when to share themes to allow the group to reflect on where they have been and open new conversations. This keeps the process moving forward.
- Provide a wrap-up of the Veteran perspective for the researcher at the end of the meeting to confirm an accurate and complete account (can elect to also provide a written copy of Veterans' feedback.

3.2.4 Meeting documentation

Engagement Group meetings should be documented in order to have a record of information shared during a meeting. Ideally there is a designated note-taker for each meeting that is neither an Engagement Group member nor the facilitator. This allows all participants to fully engage in their role during the meeting. Some groups opt to audio record meetings for accuracy; however, full transcription may not be required. If you are recording the meeting, make sure that participants are in agreement. Even if your Engagement Group is not considered human subjects research, audio recordings will still need to be stored in a locally compliant way and recorded using approved devices.

There is no consensus on the best form for meeting notes. Some groups opt to have detailed notes of the full conversation and others decide to create high level summary points of the main information shared. Given the variability in preferences across groups, you ***may ask members how they would like to capture the content of their meetings*** and try out a few formats before making a final decision. It is also important to communicate with researchers about what level of detail is most useful for them. Some will use feedback to advance their thinking, while others may desire Veteran feedback in the form of direct quotes. Knowing what is expected in advance is helpful. Samples of meeting notes are available in **Section 6.5**.

3.2.5 A final thought on facilitation

One thing we are learning as more Engagement Groups are established is that there are always challenges we cannot anticipate. Fear of challenges and uncomfortable situations is not a reason to avoid Veteran Engagement activities. However, it is important even once a group is up and running to stay attuned to tensions that may arise. In the VA we have the advantage of a research community where we actively share information and consult with each other as challenges present themselves.

At one site that contributed to this toolkit development there was tension for the facilitator when it came to working with Veterans in this capacity. The facilitator was a younger woman who had a hard time cutting off or re-directing older, male Veterans who tended to talk at length and easily got off topic. She wanted the Veteran to feel heard and, on at least one occasion, when she tried to re-direct the conversation she was ignored or talked over. This resulted in her becoming more tentative. There was also a case where the joking and teasing among group members made a liaison uncomfortable. It is interesting to note that the majority of Engagement Groups we collaborated with are organized and/or facilitated by women. Gender, age, and military background are factors that may affect group dynamics. In addition to checking in with Engagement Group members periodically, it is also important to maintain open communication with individuals who are acting as a group liaison or as a facilitator. Should tensions arise it is helpful to address with individuals and the group as needed.

3.2.6 Resources for Meeting Facilitation

These are some outside articles, resources, and books that we have found beneficial to the group as they learned more about facilitation.

The Art of Facilitative Leadership: Maximizing Others' Contributions: offers an in-depth look at facilitative leadership including the fundamentals and six major themes of facilitative leadership. The Systems Thinker – The Art of Facilitative Leadership: Maximizing Others' Contributions - The Systems Thinker

Index of Community Engagement Techniques: a comprehensive list of community engagement techniques that can be selected based on the level of engagement you are conducting. TOOL | Index of Community Engagement Techniques (tamarackcommunity.ca)

Building the Field of Community Engagement-Resource page: list of documents and resources that compliment community engagement, leadership development, or community wealth building tools. Resources | Nexus Community Partners (nexuscp.org)

Community Engagement Assessment Tool: assessment tool for individuals or organizations to use in a variety of different ways. Few examples listed by designers of the tool: to assess your strengths and areas for professional growth; with staff in your organization to see where there is agreement, disagreement or tensions about your community engagement efforts; with board members to begin or deepen a conversation about community engagement within your organization; and many more. CEAssessmentTool_10.15.20.pdf (nexuscp.org)

Community Conversations by Paul Born: book focusing on facilitation tools

Pedagogy of the Oppressed by Paulo Freire: book focusing on theory of engagement

The Art of Gathering by Priya Parker: book focusing on stories and ideas about the power of purposeful hosting

Tribe by Sebastian Junger: book focusing on Veteran experience and the power of small groups with a clear purpose

The Culture Code by Daniel Coyle: book focusing on belonging, cooperation, and leadership

3.3 Post-Meeting Follow-Up

Following each meeting, Engagement members and researchers should be able to expect the following:

- Meeting notes that reflect the information shared during the meeting
- A list of action items for members and/or researchers (as appropriate)

- The time, date, and location of the next meeting (if known)
- A post-meeting evaluation survey (see Section 5 for using this strategy as a way to gauge satisfaction with the Engagement Group)

Creating Feedback Loops: *Engagement Group members are more likely to stay engaged if they believe that they are providing meaningful input to people who are listening and able to act on their recommendations.* This does not mean that every idea must be acted upon or adopted, but it does mean that the ideas are seriously considered. It also means that Engagement Group champions or facilitators should have a strategy for circling back to researchers to learn how they used the information provided. Some feedback loop strategies include:

- ***Semi-structured survey*** can be sent to researchers following the meeting to assess satisfaction with: a) meeting preparation, b) meeting organization, and c) quality of input. Open-ended questions can ask for information about how the input is being incorporated into research studies. A similar survey can be used for Engagement Group members to offer feedback on: a) pre-meeting preparation, b) presentation(s), and c) receptivity to input. This has proven to be a way for Veterans and stakeholders to communicate feelings that may not have been expressed during a meeting.

- ***Recommendations checklist*** can be generated from meeting notes and sent to researchers to review. The checklist would have a summary of key recommendations or ideas provided. Researchers could check when recommendations are incorporated, under consideration, or not used.

- ***Follow up conversation*** with researchers could also be organized to gather more qualitative feedback on how the meeting went and how recommendations are being incorporated into research studies. It will be helpful to have a copy of the meeting minutes to refer to during the conversation. Follow up conversations can also be informal; there is a lot of information that gets shared in the 15 minutes after a meeting ends or in the hallway while people are heading out of the building.

Information about how information was incorporated can be shared at the beginning of each meeting. It can also be communicated back to Engagement Group members in written format. You may want to discuss what members prefer and try their recommended approaches.

3.4 Keeping Engagement Board Members Engaged

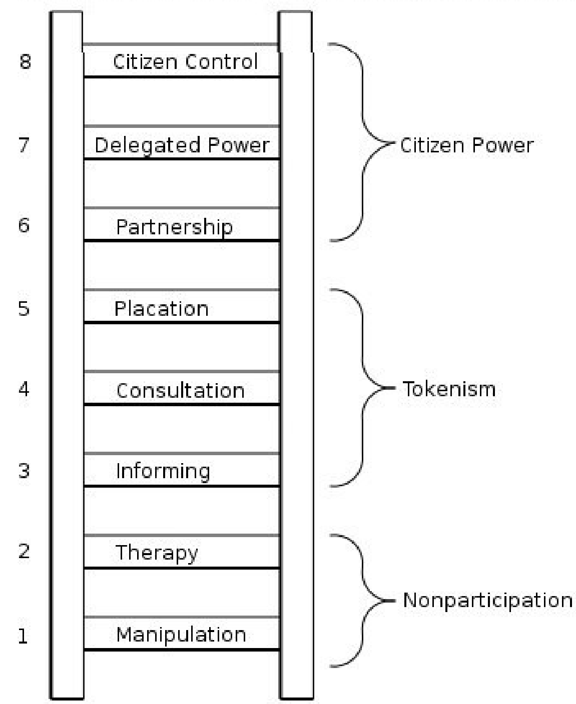
3.4.1 Signs of Disengagement.

Oftentimes, Veterans who volunteer to engage with researchers are Veterans who volunteer for a lot of other activities as well. This can lead to competing priorities and "volunteer fatigue." Additionally, changes in project focus can lessen the interest of volunteers who signed on because they felt passionate about a specific issue or topic. Others may become frustrated if they don't see their ideas reflected in grant applications and research studies, or feel there is no room for personal advancement. It is not uncommon for some participants to engage in research with the hope of becoming researchers themselves or conducting a study. These and other factors can contribute to gradual, and sometimes abrupt, disengagement. Setting clear expectations for the role of Engagement Group members, and revisiting these expectations at least annually, can help reduce disappointment.

3.5 Avoiding Tokenism or Rubber Stamping

As more VA research funding requires the inclusion of Veteran Engagement, we want to be aware of the pitfalls that could lead to tokenism and rubber stamping.

Figure #1: Sherry Arnstein's Ladder of Citizen Participation



Merriam-Webster defines tokenism as the policy or practice of making only a symbolic effort. In public participation, like VEGs, Sherry Arnstein's seminal work, the Ladder of Citizen Participation (https://organizingengagement.org/models/ladder-of-empowerment/) (Figure #1), shows that activities such as informing, consultation and placation have the potential of resulting in tokenism. Additionally, on Arnstein's Ladder, Rubber Stamping is considered "a distortion of participation" for public relations, and ultimately is considered a type of manipulation.

Teams can avoid tokenism or rubber stamping through the following:

- Agree upon clear intentions for the outcomes of the meetings by answering the following questions: _Who_ should benefit from these engagement meetings and _how_ should they benefit? Work together to create an expectation that everyone benefits from the meeting equally and then put practices into place to meet those expectations.

- Always have at least 2 Veteran members as part of a non-veteran activity – including: conference presentations, attendance at board meetings, hosting information sessions at local events, and others.
- Ensure Veteran participants that they are only expected to speak from their own experience, and not represent all other Veterans.
- Compensate Veterans for their time.
- Find ways for the Veterans and the VEG to be acknowledged for their work. Think outside of the box of research dissemination – acknowledgement can be through newsletters, an email to a higher-up with the Veterans included, an award ceremony, and more.
- Encourage researchers to engage with Veterans in other ways outside a VEG meeting, for example: hiring Veterans as consultants, inviting VEG members to research center holiday gatherings or research center celebrations.

A few common signs that a Veteran may be disengaging include:

- Unreturned emails and phone calls
- Decrease in meeting attendance
- Decrease in the number of contributions during meetings
- Decrease in the quality of contributions to the group
- Affective changes, such as boredom or frustration, expressed verbally or non-verbally

Some strategies for handling disengagement include:

- Initiate (or renew) **relationship-building** efforts: Make activities FUN! This should be something participants *want* to do. Ensure there are opportunities to socialize, share personal stories, and "break bread" together. Find a better balance between business and pleasure. Consider ways to bring food, games, media, or pets into routine activities, or as special events.
- Create (or enhance) **feedback loops** that enable Veteran participants to clearly see how their contributions have changed the course of the project, how their ideas have been incorporated into something *meaningful*. Take notes about who says what and refer to these comments or suggestions at subsequent meetings.
- Simply **ask!** *What's changed? What can we do? What would you like to get out of this?*
- Demonstrate **reciprocity:** Inquire about ways *we* can help *them.* Consider ways to live the principle of "mutual helpfulness" espoused in the American Legion's mission statement.

Consider accommodating this lifecycle with:

- Term limits (e.g., annual), rotation/re-assignment, holidays/hiatuses
- Routine "check-ins," assessments – *What's working well? What could be improved?*
- Opportunities to "mix it up," i.e., for Veterans to work in different venues, take on a new role, or have different duties

3.4.2 Bringing New People to the Table

As some Veterans disengage from activities, whether by choice or circumstances, new Veterans will be needed to take their places. Consider asking those who leave for referrals/recommendations. Consult with members of your "core group."

TIP

Orientation ideas for new Veteran volunteers

- Creative **icebreaker activities** that happen ***on an ongoing basis*****:** These can make it more interesting for the people who are already in the group AND makes it easier for a new person to catch up socially.
- **Veteran-Veteran Orientation:** Connect a new participant to a Veteran participant to update the rookie on the informal rules of the group. You can also invite the group to lead orientation for new members; this will give you the opportunity to hear how the group views the encounters as well as their task as an Engagement Group.
- **Review orientation materials** with new members on a periodic basis. The facilitator or Engagement Group Leads may be the best to provide a formal orientation to the purpose of the group, what participation entails, and what to expect from members and researchers.
- Foster integration into the group dynamic by including **team-building activities** on an ongoing basis.