PA'LANTE
Assessment Planning Toolkit

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Overview

The Patient Action Leaders Advancing Novel, Transformative, Equitable (**PA'LANTE)** Health Care assessment planning toolkit draws on existing curriculum *Connecting Communities to Research (CCR)*, training developed by Battaglia et al. (2019), as part of their Eugene Washington Engagement Award. Specific CCR units we will use include: ***Experience with Research, Keys to Advocacy, Advocacy vs. Research, What is Research, Research Process, and Story-telling.*** In addition, we are using *Spanish-language* training resources available through PCORI. The model seen on the next page provides an overview of the PA'LANTE training plan.

The assessment plan emphasizes learner empowerment in the context of patient-centered comparative *clinical effectiveness research (CER)* agenda setting and is designed to engage Latinas in an applied exploration of:

1. Factors that determine Latina health and wellbeing,
2. Health systems contributions to health, and
3. Priority areas for CER.

Key topics that run across the curriculum are health and wellbeing, health systems, and patient-centered CER.

The PA'LANTE team will begin with a pre-curricular team-building unit during the orientation, designed to support group development (e.g., charter finalization) and provide context for the project. Team building does not end with the pre-curricular unit; activities to support group development are integrated across the training.

In **Unit 1**, the team will be introduced to key concepts, which they will then explore through applied inquiry across Units 2–4. In **Unit 2**, they will examine available CT data, after which they will engage in mapping activities to explore the drivers of trends they identify. Specifically:

- Eco-mapping will be used to look at the **drivers of Latina health,**
- Journey mapping will be used to examine **healthcare experiences**, and
- Power-mapping will be used to explore **dynamics.**

As the team engages with these applied training activities, they will begin to hone in on priority areas for patient-centered CER. The PA'LANTE team will then bring this line of inquiry into Unit 3, during which they will apply what they have learned in Units 1 and 2. The focus of **Unit 3** is action; this will involve assessment as well as participatory planning with data to build a Latina CER agenda.

Finally, in **Unit 4,** the team will strategize around dissemination planning and explore ways in which to share, vet, and broadly promote their agenda as they plan for implementation.

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Assessment Training Plan

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PA’LANTE Training Plan		Unit 1 Key Concepts	Unit 2 Exploration	Unit 3 Action	Unit 4 Dissemination
Pre-Curriculum: Team Building	Health & Wellbeing	What is health? Health equity Social determinants of health & mobility Stress and the body Ecological model	The health & wellbeing of Latinas in CT: What do we know and what is driving the outcomes we are seeing?	Assessment planning and implementation	Share your story, spread the word. Identifying the audience. Refining the message Determining the medium. Getting it out there.
	Health Delivery Systems	What are the health care delivery systems Latinas are using? How does care delivery impact Latina health?	Mapping the patient journey and exploring how power operates in the health care system.	Contextualizing assessment data in the context of health care delivery for Latinas	
	Patient-centered CER	What is PCORI? What is patient-centered comparative clinical effectiveness research (CER)?	Priority setting and narrowing a focus area. What is most important for areas of focus for Latina health and health care?	Using assessment data for agenda setting. Developing a Latina patient-centered CER agenda	

Schedule of Initial Training Sessions

Session #	Topic	Overview of content	Between Session Activities
1	Onboarding	Individual meetings with participants	Review program materials: charter template, project 1-pager, contact information
2	Orientation	Introductions, Community building, Equity and equality, Charter finalization, Project overview, Introduction to key concepts	View Place Matters
3	Health, Health, Equity, SDOH	Group analysis, Key concepts, Eco-mapping the determinants of Latina health in Hartford	View 1 minute video about health care journey mapping Reflect on the conditions we identified impacting Latina health
4	Patients and the Health System	Group discussion, Journey Mapping activity, Power and decision-making	Reflect on our discussions. What are research priorities based on the journeys we have explored and the ecological model we created?
5	PCORI CER and agenda setting	Brainstorming priority areas, Prioritization activity	View PCORI Research Module
6	Assessment Planning	Community assessment, Purpose and processes, Different methodological approaches and feasibility.	View PCORI Study Design Module
7	Assessment Methods	Methods: Brainstorming the best way to collect information about what we want to know more about, Explore roles needed and costs associated with the method	View PCORI Sampling and Recruitment Module
8	Assessment Protocol Development	Sampling, Recruitment Strategies, Procedures	Schedule assessment implementation phase

Session Considerations

Standard Introduction Procedures

This procedure will be used in all the sessions with exception of session 1: pre-session meeting

1. Arrive Early for Setup
- Arrive at least 30 minutes before the session begins.
- Use this time to:
  - Set up the space (tables, chairs, materials, slides, etc.).
  - Receive and organize food delivery.
  - Ensure childcare accommodations are in place.
- Make sure the space:
  - Is large enough for the group to sit together and view slides.
  - Has additional space for breakout or art activities.
  - If needed, arrange to use two smaller spaces instead of one large one.

2. **Welcome Participants**
- Create a warm, welcoming environment:
  - Play background music as participants arrive.
  - Greet each person individually and let them know the session will begin once everyone has arrived.
- Use a sign-in sheet to:
  - Track attendance.
  - Support distribution of participant payments at the end of the session.

3. Begin the Session with Introductions
- Once everyone has arrived, begin with participant introductions.
- Suggested structure for introductions:
  - Name
  - Pronouns
  - Neighborhood or community
- Include a low-risk warm-up question to help people feel comfortable. Some examples:
  - “What’s one thing you like to do on rainy days?”
  - “What was a game you liked to play as a child?”

4. Review Agenda, Objectives, and Recap
- Briefly review the session agenda and objectives with the group.
- Provide a quick recap of the previous session (if applicable).
- Revisit the group norms and ask if participants would like to suggest any additions or changes.

Additional Considerations

Please ensure that the group has sufficient space to comfortably move around and participate in all planned activities. Because sessions take place in the evening, dinner and childcare are provided. Additional guidance related to refreshments, childcare, and other logistical considerations can be found in Appendix A.

One Onboarding

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Objective

THE OVERALL OBJECTIVES OF THE PRE-SESSION MEETING ARE TO:

1. Prepare participants for the orientation and training.
   a. Answer participant questions related to the orientation and training.
   b. Set participant expectations for the orientation and training.
   c. Connect with participants and begin to establish rapport.

Needed Supplies

Materials needed for pre-session meetings include a charter template that will be used to build the board charter, a written one page overview of the project (this can be a Word document or slide), a copy of the meeting agenda for the first session, and any additional materials participants may need time to review before the first session.

Procedures

The pre-session meeting should be scheduled at a time and location that is convenient for participants. This meeting can be held in person at your site or virtually using a platform like Zoom or Microsoft Teams. Participants should be informed in advance about the expected duration of the meeting. We recommend keeping it between 20 to 30 minutes.

This initial meeting will function much like a one-on-one. The primary goal is to build rapport with participants and answer any questions they may have about the project. It's helpful to share a one-pager or slide that outlines the project goals and board member expectations. This will give participants a clear overview of their role and the purpose of the project.

During the meeting, the facilitator will begin to orient the group toward creating a charter. Sharing draft elements or a charter template before the meeting can give participants time to review the material and prepare questions. Please find a sample charter that the PA'LANTE group used in this project.

If the charter does not include meeting logistics, you should also provide participants with a schedule of meetings, along with details such as parking instructions and site access information.
This is a good opportunity to:

- Discuss participants' access to online resources and decide on a document-sharing system (e.g., Google Drive).
- Identify participants' preferred communication methods (e.g., email, text, WhatsApp).
- Share team contact information in case participants have follow-up questions.

By taking these steps, you can ensure participants are well-informed, comfortable, and ready to engage in the project.

Two

Pa’lante Orientation

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Objective

THE OVERALL OBJECTIVES OF THE ORIENTATION SESSION ARE TO:

1. Build community and establish norms rooted in equity.
2. Allow participants to develop a shared understanding the overall goal of the project.
3. Introduce participants to PCORI health research and key terms.

Needed Supplies

Materials needed for the orientation session include name tags, markers, large post it pads, an orientation folder that includes the charter template, agenda, meeting schedule, contact information, slide handouts, and any other documents you'd like participants to take away. Additional materials needed for this session include a slide deck with key information and terminology to be discussed with participants (see Appendix E).

Agenda

- Welcome and Introductions
- Overview of background and objectives
- Team building activity
- Collaborative work
  - Group norms
  - Equity vs. Equality
  - Charter development
- Next Steps

Procedures

After introductions, the facilitator should review the session agenda and goals, followed by an overview of the overall project, including background information and key concepts such as PCORI, patient engagement, and comparative effectiveness research. Once the information has been reviewed, participants will likely benefit from a movement break. A recommended activity is “The Wind Blows,” which helps participants build connection, practice listening, experience leadership, and have fun.

For this activity, chairs should be arranged in a circle with one chair per participant and no chair for the facilitator, who will stand in the middle. The facilitator explains the rules, emphasizing that there should be no running, pushing, or shoving. The person in the middle starts by saying, “The wind blows for anyone who…” followed by something true about themselves. Participants who relate to the statement will stand and cross the circle to find a new seat, ensuring they do not move to the seats immediately to their left or right. The facilitator quickly takes a seat, leaving one person in the middle to continue the game. As the game progresses, participants typically move from simple statements like clothing items to more personal traits or interests. The activity should last approximately 20–30 minutes, depending on group size.

At the end of the game, the facilitator should lead a debrief using reflective questions such as:

- *What did you think of this game overall?*
- *Why do you think we played it?*
- *What was it like to be in the middle?*
- *What was it like to be around the circle?*

Procedures

Facilitators should encourage deeper reflection by asking follow-up questions to explore participants' experiences, strategies, and feelings related to being in the spotlight. Common themes include the challenges of speaking in front of a group, comfort with visibility, and the power of words to move people. The facilitator should draw connections between being in the middle and the roles of community researchers or patient leaders, emphasizing that leadership requires listening, sharing, and influencing change. The activity closes with a reflection inspired by Paulo Freire: "We all have something to teach, and we all have something to learn," reminding the group that sometimes we will be in the chairs, and sometimes we will be in the middle.

Following the activity, offer participants a short break if needed. When the group reconvenes, they will shift focus to collaborative work by developing group norms. The facilitator should guide this process by asking what the group needs to work together successfully and record responses on a large post-it pad. Common norms include “what is said here stays here,” “one person speaks at a time,” “listen to understand,” and “assume good intent.” The group should agree on the norms and clarify that everyone is responsible for upholding them, not just the facilitator. This practice helps create a safe, shared space where accountability is collective. All participants, including the facilitator, should sign the norms document, which will serve as a living document that can be revisited and amended in future sessions.

Next, the facilitator will lead a discussion on equity versus equality, using an activity provided in the session slides to help participants distinguish between the two. For example, while virtual and in-person participation are not equal experiences, they can be equitable based on participants' needs. This concept will help guide the group in developing a flexible charter that supports all members.

The charter development process begins with a provided template **(see sample charter)**. Participants will pair up to review the template and suggest edits or clarifications. After 10–20 minutes, the group will reconvene, and each pair will share their feedback. The group will then revise the charter together using consensus decision-making **(see Fist or Five** or **Dot Voting tool)**. The final version will be reviewed and signed in the next session.

The session concludes with a plus/delta reflection, where each participant shares one thing they appreciated about the session (plus) and one thing they would change (delta). The facilitator will then review any assignments or tasks to complete before the next session.

Prework for next session

To prepare for the next session, group members should watch **Place Matters.** The video is available for purchase through California Newsreel and is often accessible via university libraries.

Place Matters explores how conditions in our communities shape health and well-being. Please watch it before the next session. Some parts, such as the segment on community violence, may be difficult to view. If needed, feel free to take a break or skip ahead to the next section.

Three
Health, Health Equity, SDOH

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Objective

THE OVERALL OBJECTIVES OF THIS SESSION ARE TO:

1. Build community.
2. Develop an understanding of the ecological model.
3. Explore the determinants of Latina health in Hartford.

Agenda

- **Welcome, Norms, Charter Signing**
- **Warm-up question: What is one thing you took away from Place Matters?**
- **The determinants of Latina health in Hartford: Eco Mapping Activity**
  - **Introduce ecological model**
  - **Brainstorm factors at each level that influence Latina health.**
- **Next Steps**

Needed Supplies

Materials needed for this session include name tags, markers, large post it pads, the group norms from the orientation and a copy of the final charter. Additional materials needed for this session include a slide deck with key information and terminology to be discussed with participants (see Appendix F).

Procedures

After reviewing the group norms and finalizing the introduction procedures, introduce the final version of the charter which should be updated based on the group's feedback in the orientation session. Ask participants to sign the final version of the charter. Once the charter is signed let the group know that it will be scanned and a final version will be saved on the shared drive (for more information about file storage and sharing materials see Appendix B).

The next agenda item is to debrief Place Matters, which participants viewed between sessions. Break participants up into pairs or groups of three. Ask each group to discuss one thing they took away from watching Place Matters. The group should assign a note taker and a reporter. They can reintroduce themselves to one another in the group and then each respond to the prompt. The responses should be written on large post its. This breakout activity should take about 5-10 minutes. Each group reporter will be given 1-2 minutes to share what was recorded. The post its will be left the front of the room. Once each group has reported out, the facilitator will ask participants themes they see across the responses and engage with them in a broader discussion of the film.

The facilitator will then transition into slides defining Health Equity and the social determinants of health. As the facilitator is discussing each of the terms they will draw on examples from the film to bring the terms to life for participants. The facilitator will then introduce ecological systems theory and talk about the determinants in the context of the theory again using examples from the film about people who are part of neighborhoods that are influenced by broader socio-political forces.

Three: Health, Health Equity & SDOH

Procedures

The facilitator will then ask participants to think about their own communities and the ways in which their own communities influence health and well-being using the following prompts.

- *What are community level factors that impact the health of Latinas in Hartford. What are the broader sociopolitical factors that influence neighborhood conditions in Hartford?*
- *What are the health issues that Latinas in Hartford face and how are they influenced by community conditions and sociopolitical factors?*

Participants will be broken up into smaller groups of three to four depending on the size of the overall group. The facilitator will give each group a large post it pad and will share an example of an ecological model. The facilitator will then ask the group to consider the prompts and the discussion and to draw examples of factors that influence Latina health in Hartford across the different levels of the ecological model. Groups will be given about 30 minutes to work on their projects after which they will present them back to the larger group. After each group has presented, the facilitator will ask the participants what themes they heard during group presentations and what themes they see as they view the models.

At the end of this session, the team will have a list of conditions impacting Latinas as well as an understanding of the factors that drive those conditions at different levels. We will revisit the ecological model and common health conditions with the group when we go into the brainstorming session for the assessment.

The session concludes with a plus/delta reflection, where each participant shares one thing they appreciated about the session (plus) and one thing they would change (delta). The facilitator will then review any assignments or tasks to complete before the next session.

Prework for next session

In preparation for the next session participants will watch a brief video on journey mapping available at: youtube.com/watch?v=78fGc8LGOwk

In addition, they will reflect on the conditions we identified impacting Latina health, and determine:

1. *What questions they have related to ways to impact care for these conditions; and*
2. *What are the most pressing questions related to health care options that might improve Latina health for the conditions we discussed?*

Four
Patients and the Health System

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Objective

THE OVERALL OBJECTIVES OF THIS SESSION ARE TO:
1. Build community.
2. Explore the health care systems experiences of Latinas in Hartford.
3. Map the health care journey of Latinas in Hartford
4. Begin to explore the most pressing questions. related to health care options that might improve Latina health for the conditions we have identified.

Needed Supplies

Materials needed for this session include name tags, markers, large post it pads, the group norms from the orientation and a copy of the ecological model and post its from the previous session. Additional materials needed for this session include a slide deck with key information and terminology to be discussed with participants (see Appendix G).

Agenda
- Welcome, Norms, Recap
- Pair Share: As a patient what is your role in decision-making in your care? How and when does your provider engage you in decision-making?
- Journey Mapping
  - Explore opportunities to engage in decision-making at different points in the journey?
  - Explore where and how to improve care at different points in the journey?
- Next Steps

Procedures

After introductions, the session begins with a pair share. Break up the group into dyads and explain that they will have 3 to 5 minutes to discuss the following prompts:

- *As a patient what is your role in decision-making in your care?*
- *How and when does your provider engage you in decision-making?*

The facilitator explains that participants will share key themes from their pair discussions at the end of the activity. Before breaking into pairs, the facilitator invites clarifying questions. After discussions, the group reconvenes, and each pair briefly (1 minute) shares a summary, which the facilitator captures on chart paper. Once all pairs report out, the facilitator reviews the themes with the group, prompting reflection on patterns and recurring ideas. The facilitator reminds participants that identifying questions related to health care decision-making is key to building a patient-driven research agenda and may briefly explain that a research agenda guides which topics researchers pursue to advance a field.

Four: Patients and the Health System

Procedures

The facilitator begins by reminding the group that the goal of the project is to develop a plan that helps researchers improve care for Latinas as they navigate the healthcare system. The next activity will focus on identifying opportunities for patient engagement in decision-making by mapping the patient journey. Participants will have previously viewed a short video introducing journey mapping and outlining the steps of a typical healthcare experience.

To begin, the facilitator engages the group in a brainstorming discussion about what happens during a health care visit. As participants share, the facilitator maps out the visit in sequence on large post-it pads at the front of the room. Participants may also choose to sketch their own version on individual paper. This brainstorming phase may last between 5 to 10 minutes, depending on the depth of the conversation. Once a preliminary patient journey map is created, the group will begin identifying opportunities to support decision-making and improve care at different points in the journey.

Following the brainstorming, participants are divided into small groups of three to four people. Each group is asked to reflect on the patient journey map and respond to two prompts:

1. *Where are there opportunities to engage patients in decision-making during the healthcare journey*
2. *How might the patient experience be improved at different points in the journey?*

Before breaking out, the facilitator should ask if there are any clarifying questions and explain that each group will report out key themes at the end of the activity.

Once small group discussions are complete, the facilitator reconvenes the full group and invites each small group to share their high-level takeaways. As each group reports out, the facilitator records emerging themes on large post-it notes at the front of the room. After all groups have shared, the facilitator guides a group reflection on the reported themes and facilitates consensus-building around key opportunities for patient engagement, decision-making, and care improvement throughout the health care journey.

To close the session, the facilitator previews the focus of the next session: identifying and prioritizing health conditions that are high priorities for Latinas. This conversation will build on prior group discussions and existing data reports. The session concludes with a plus/delta reflection, in which the facilitator goes around the circle and asks participants to share one thing they liked about the group (plus) and one thing they would change (delta).

Prework for next session

For pre-work, participants will be asked to reflect on the discussions so far and consider:

Based on the patient journeys explored and the ecological model created, what are the most important research priorities?

Five
PCORI CER & Agenda Setting

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Objective

THE OVERALL OBJECTIVES OF THIS SESSION ARE TO:

1. Build community.
2. Prioritize a list of conditions identified by the group.
3. Begin to explore questions related to health care options that might improve Latina health for the identified conditions.

Agenda

- **Welcome, Norms, Recap**
- **Pair share warm-up question: when you have many options in front of you how do you approach decision-making?**
- **Prioritization activity**
  - **What we know**
  - **What available data tells us**
  - **Dot-polling prior conditions**
- **What questions do we have for the community related to these conditions and options that might improve their treatment for them?**
- **Next Steps**

Needed Supplies

Materials needed for this session include name tags, markers, large post it pads, the group norms from the orientation, and a copy of the ecological model and journey maps from the previous sessions. Additional materials needed for this session include a slide deck with key information and terminology as well as local data trends related to Latina health in Hartford (see Appendix H).

Procedures

The session begins with a pair-share activity. The facilitator divides participants into dyads and introduces the following discussion prompts:

1. When you have many options in front of you, how do you approach decision-making?
2. What types of information do you need to make a decision?

Each pair is given 3 to 5 minutes to discuss. Before breaking out, the facilitator invites any clarifying questions and explains that each pair will later share key insights from their conversation.

Once the time is up, the facilitator reconvenes the full group and invites each dyad to provide a 30-second high-level overview of their discussion. As each pair reports out, the facilitator records emerging themes on a large post-it pad at the front of the room. After all pairs have shared, the group is asked to review the list and reflect on any common themes they notice. During the debrief, the facilitator reminds the group that the goal of the session is to identify health-related priority areas for Latinas. Because this involves making decisions, it's important to understand how different people approach decision-making and the information they need to feel confident in those choices.

Five: PCORI CER & Agenda Setting

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Procedures

To prepare for the prioritization activity, the facilitator briefly reviews the ecological model and journey mapping notes previously developed by the group. The facilitator also shares relevant data trends and themes related to Latina health in Hartford **(see Appendix H)**. either via slides or a one-page handout. The group is invited to compare and contrast the external data with their own insights from earlier activities. This open discussion provides space for additional reflection, with themes recorded at the front of the room.

Next, the group is divided into small groups, each with a large post-it pad. Each group is asked to respond to the following prompts:

1. *What are the top three pressing health issues impacting Latinas in Hartford?*
2. *How do these conditions impact the lives of Latinas in Hartford?*
3. *What does available treatment for these issues look like in Hartford?*
   a. *Is it accessible and does it work for Latinas?*
   b. *Are there better ways to provide care to Latinas for this condition?*
   c. *Are there opportunities to engage Latinas in improving care for this condition?*

Groups are given approximately 20 minutes to discuss, depending on group size and available time. When time is up, the facilitator brings the full group back together and invites each group to report out their top themes. These are recorded on large post-its. The facilitator then guides a group reflection to identify shared priorities and uses consensus-building or dot polling to determine which health areas the group will explore further.

With priorities identified, the facilitator prompts the group to begin identifying what they want to learn more about related to each condition, particularly as it relates to access, care, and community priorities. To close the session, the facilitator leads a plus/delta reflection, asking each participant to share one thing they liked (plus) and one thing they would change (delta) about the session.

Prework for next session

Following the session, the facilitator prepares a brief summary outlining the identified priority conditions, strategies, and opportunities for improving care. This document should be shared with participants and stored on the team drive.

Before the next session, participants are asked to review and comment on the summary asynchronously, suggesting revisions or additions as needed. They will also review the following module.

View PCORI Research Module

Six
Assessment Planning

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Objective

THE OVERALL OBJECTIVES OF THIS SESSION ARE TO:

1. Build community.
2. Develop an understanding of the assessment process.
3. Determine assessment goals.
4. Explore assessment methods that can be used and the types of data they produce, and their feasibility.

Needed Supplies

Materials needed for this session include name tags, markers, large post it pads, the group norms from the orientation notes from the previous session. Additional materials needed for this session include a slide deck with key information and terminology to be discussed with participants **(see Appendix I).**

Procedures

The session begins with a pair share. Break up the group into dyads and explain that they will have 3 minutes to discuss the following prompt.

- *What do you think about when you hear the term assessment?*

Agenda

- **Welcome, Norms, Recap**
- **Pair share warm-up question: What do you think about when you hear the term assessment?**
- **Assessment 101**
  - **Key concepts**
  - **Methods**
  - **Feasibility**
- **Brainstorm and build consensus: What are the things that we will assess to inform our research agenda/what are our goals?**
- **Next Steps**

Explain to the group that they will have the opportunity to share high level themes from their discussion at the end of the activity and ask if there are clarifying questions before the group breaks up. At the end of the pair share, reconvene the group. Give each dyad about 30 seconds to provide a high level overview of their discussion. As the participants report out record themes on a large post it at the front of the room. After each dyad has presented, reflect on the themes that you have heard. Explain to the group that one of their key goals in the fall will be to conduct an assessment during which they will collect information to inform their Latina research agenda.

Six: Assessment Planning

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Procedures

The next 10 minutes are dedicated to reviewing the assessment slide deck. The goal of the presentation is to establish a shared understanding of assessment among participants. The facilitator will define key terms such as “community” and “assessment,” explain the purpose of community assessments, and highlight successful strategies for implementation.

Following the presentation, the group will engage in a brainstorming session to clarify what they hope to learn through their assessment, based on the priority health conditions identified in the previous session. The facilitator will begin by reviewing key notes from that meeting, including the conditions the group plans to focus on and what they already know. The brainstorming will center around the following questions: What are the key conditions impacting Latinas in Hartford? What is already known about treatment for these conditions? What questions do Latinas have about their care and treatment experiences? This discussion should lead to a set of draft goals for the upcoming assessment, specifically, what the group hopes to understand or explore more deeply.

To close the current session, the facilitator leads a plus/delta reflection, asking each participant to share one thing they liked about the group (plus) and one thing they would change (delta).

Prework for next session

After the session, the facilitator prepares a brief summary outlining the group’s key questions and assessment goals. The summary should also include any comments related to possible assessment methods or data collection procedures.

In the next session, participants will identify appropriate methods for collecting the data they need to answer their questions and meet their assessment goals. They will also review the following module:

View PCORI Study Design Module

Seven
Assessment Methods

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Objective

THE OVERALL OBJECTIVES OF THIS SESSION ARE TO:

1. Select the assessment methods the team will use.
2. Explore assessment roles need based on the methods and goals of the assessment.
3. Explore expenses associated with the methods and begin to budget.

Needed Supplies

Materials needed for this session include name tags, markers, large post it pads, the group norms from the orientation, and notes from the previous session. Additional materials needed for this session include a slide deck with key information and terminology to be discussed with participants **(see Appendix J).**

Agenda

- **Welcome, Norms, Recap**
- **Warm-up activity: Team asset inventory**
- **Review assessment goals**
- **Select assessment methods based on goals**
- **Brainstorm potential assessment related expenses**
- **Next Steps**

Procedures

This session begins with a team asset inventory activity. Each participant receives a list of activities **(see Appendix J)**. and is asked to walk around the room to identify two to three team members who are particularly strong at each activity. Once the inventory is complete, participants record the names they've gathered on a large post-it sheet at the front of the room. This sheet includes a table with the activities listed along one side and blank space for entering team members' names. Once the matrix is filled out, the facilitator invites the group to reflect on what they learned from the activity. This exercise serves three purposes:

1. It helps participants learn about each other's strengths,
2. It offers practice in collecting and organizing information, and
3. It provides useful data for assigning roles as the team prepares to implement the assessment process.

Following the warm-up, the facilitator revisits the assessment goals established in the previous session. Participants are informed that the next part of the session will focus on identifying research methods that will allow them to answer their key questions and meet their goals.

Seven: Assessment Methods

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Procedures

The facilitator presents a brief 10-minute overview of various data collection methods using the provided slide deck or a customized version. Once the presentation concludes, the group is asked to reflect on what they learned, including insights from the PCORI video they previously watched on research methods. Reflections are recorded on a large post-it pad at the front of the room.

Building on this discussion, the facilitator works with the group to narrow down the data collection methods they will use for their assessment. Common options include brief surveys, photovoice, and focus groups. As methods are selected, the group is encouraged to consider feasibility, including capacity, time, and resources. Utilize **Appendix B** and **Appendix C** to support the assessment development,

Once a method or combination of methods is chosen, the facilitator begins guiding the group through protocol development. For example, if a survey is selected, participants are asked to brainstorm questions or items they believe should be included. If photovoice is selected, the facilitator provides sample protocols for reference and discussion. This collaborative protocol drafting marks the beginning of the group's transition into implementing their research plan.

To close the session, the facilitator leads a plus/delta reflection, inviting each participant to share one thing they liked about the group (plus) and one thing they would change (delta).

Prework for next session

After the session, the facilitator prepares draft versions of the protocol documents based on group discussion and meeting notes. These drafts should also reflect any relevant comments about roles and budget considerations.

Participants are asked to review and comment on the draft research roles, protocols, and initial expense estimates before the next session. They will also review the following module:

View PCORI Sampling and Recruitment Module

Eight
Assessment Protocol Development

Objective

THE OVERALL OBJECTIVES OF THIS SESSION ARE TO:

1. Determine sampling and recruitment strategies.
2. Finalize procedures that align with methodology.
3. Finalize roles and expenses.
4. Establish an implementation timeline for the assessment.

Needed Supplies

Materials needed for this session include name tags, markers, large post it pads, the group norms from the orientation and notes from the previous session. Additional materials needed for this session include a slide deck with key information and terminology to be discussed with participants **(see Appendix K).**

Agenda

- **Welcome, Norms, Recap**
- **Pair share: What is the best way to reach Latinas in Hartford**
- **Sampling and Recruitment 101 discussion**
  - **Reflect on content from the video**
  - **Application: Develop a sampling and recruitment plan**
- **Map out procedures**
- **Establish a timeline**
- **Next Steps**

Procedures

The session begins with a warm-up question: *What is the best way to engage Latinas in Hartford?* The facilitator invites each participant to share their thoughts, going around the group to ensure every voice is heard. As responses are shared, the facilitator records them on large post-it notes at the front of the room. This activity should take approximately 10 minutes and will later inform the group's recruitment strategies.

Next, the facilitator leads a review of sampling and recruitment concepts introduced in the video participants watched prior to the session. Additional tools, such as a slide deck or terminology handout, may be used to reinforce the concepts. The facilitator explains the distinction between sampling, identifying which individuals from the population to engage, and recruitment, determining how to engage them. The group is then asked to identify who they plan to engage in their assessment based on the previously selected methods and goals. Following this, the group brainstorms recruitment strategies, drawing on ideas from the warm-up activity. Consensus-building strategies such as dot polling can be used to prioritize recruitment approaches.

Eight: Assessment Protocol Development

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Procedures

Once the sampling and recruitment plans are finalized, the facilitator works with the group to map out implementation procedures for their selected assessment method. These procedures should include step-by-step recruitment processes. As the group discusses, the facilitator captures notes on large post-it sheets at the front of the room. These notes will later be synthesized into a full protocol draft and shared with participants.

With procedures in place, the group turns its attention to defining roles. Using the role description form shared before the meeting, the facilitator leads a discussion about team responsibilities. Participants are encouraged to revisit the strengths matrix developed in a prior session to align roles with individuals' interests and capacities.

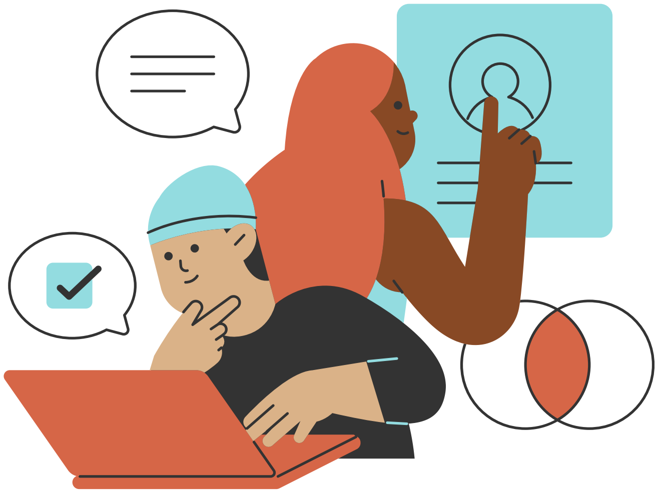
The facilitator then presents the draft budget, including both expenses previously identified by the group and any anticipated additional costs. Reviewing the budget alongside the protocol allows the group to assess feasibility and make adjustments if necessary. If budget limitations pose challenges, the team may need to revise roles, procedures, or methods to ensure the project remains achievable.

By the end of this session, the group will have finalized key elements of their assessment: procedures, roles, and budget. The facilitator outlines the next steps, which include planning upcoming meetings, conducting a session on research ethics, and organizing practice sessions. All materials developed during the session will be compiled by staff into final protocol documents. These materials will be submitted as an amendment to the existing Institutional Review Board (IRB) protocol, which currently qualifies as non-human subjects research. While it is expected that the assessment will also meet non-human subjects criteria, the facilitator emphasizes the importance of ongoing communication with the IRB and maintaining ethical considerations throughout the process.

The session concludes with a plus/delta reflection, where each participant shares one thing they appreciated (plus) and one thing they would change (delta) about the session.

Prework for next session

- **Schedule** assessment implementation phase which includes human subjects, practices sessions, and team meetings.
- **Review** protocols and materials developed for the assessment. Think about sampling and recruitment plans.
- Asynchronous **work** on flyers and recruitment materials.



Appendix A

Training Logistical Considerations

Platform

The first major consideration is whether you'll host your meetings in-person or online. There are pros and cons to each.

- Online meetings require fewer logistical considerations at first glance however online meetings are not possible for everyone. In some cases, internet access is not available. Access barriers can be associated with individual level factors such as not having devices as well as community level factors such as unavailable or insecure Internet access.
- In person meetings allow for human interactions, which can help the facilitator gain a more nuanced understanding of group dynamics. However, in person meetings also require more logistical considerations than virtual meetings.

Deciding whether to have an in person or virtual meetings requires that training planners assess participant access in addition to availability to ensure optimal inclusion and participation.

Online Considerations

- Does the participant have access to an Internet connection and a device that will allow them to participate in a meaningful way. For example, participating on a phone can be much more restrictive than participating on a computer?
- Can the participant navigate online technology?
- Does the participant have access to a quiet space to engage in the training without interruptions?

Facilitators are responsible for ensuring participants can meaningfully engage in the training in ways that work for them. This includes providing clear instructions for accessing materials, logging in, and navigating the platform. Facilitators should also lead conversations about participation expectations and clarify that engagement may look different for each person, such as being off-camera, while emphasizing that all forms of participation are valid, especially in discussions on equity and equality.

As the facilitator, it is important to ensure that all participants are able to engage in the training in a meaningful way that works best for them. This requires preparing and sharing clear, detailed instructions for how to access online materials and resources, as well as how to log in and navigate the training platform on their specific devices.

As you introduce and discuss the group rules, it will also be necessary to have open conversations about expectations for participation. These conversations are especially important when discussing topics related to equity and equality. It is essential to acknowledge that participants will engage in different ways depending on their individual circumstances. For example, while some may choose or be able to appear on screen, others may not—and this should not be seen as a lack of engagement. Rather, it reflects the understanding that meaningful participation can take many forms, and that an equitable approach recognizes and respects those differences.

Appendix A: Training Logistical Considerations

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In-person considerations

Space: Securing an appropriate space is the first essential step when planning an in-person meeting. The space should be comfortable and conducive to meaningful engagement in the activities you have planned. It should also be accessible to all participants and located in an area that feels safe and familiar to them. Consider the layout of the space and whether it supports interaction, movement, and any materials or equipment you may need to use.

Transportation: As you plan the training, it's important to consider how participants will get to the meeting location. Will they be driving? If so, is there adequate and affordable parking? Is the location reachable by public transportation? Depending on the answers to these questions, you may need to allocate funds to cover transportation costs such as gas stipends, ride-shares, or public transit passes. Proactively addressing transportation needs helps remove a potential barrier to participation.

Meals: If your training takes place during a meal time, be prepared to provide a meal for your participants. Even if the training is not scheduled around traditional meal times, it is still a good idea to offer snacks and drinks. Engaging with participants and community partners ahead of time can help you learn about cultural norms around food and gatherings, as well as any dietary restrictions that need to be accommodated. The more participants are involved in informing decisions around meals and logistics, the more inclusive and welcoming your gathering will be.

Childcare: Childcare is a critical consideration when planning logistics. Be sure to assess the childcare needs of your group early in the planning process and include a budget to support appropriate childcare services during the training. Providing childcare can make the difference between someone attending or not, and signals that you are committed to reducing barriers to participation.

Technology: Ensure that the meeting space has the technological setup required to support the training. This includes reliable internet, audio-visual equipment, and access to power sources if participants will be using electronic devices. Technological issues can disrupt the flow of the session and limit participants' ability to engage fully, so test equipment in advance and have backup plans in place when possible.

Overall Considerations

In addition to choosing the right platform, it's important to consider language and literacy when preparing your training. While the training is available in both English and Spanish, effective delivery may require a bilingual approach. Engaging with participants ahead of time helps ensure the materials are accessible and the experience is meaningful.

Knowing your audience also helps you plan for related costs, such as translation, interpretation, or adapting materials for varying literacy levels. This allows for more accurate budgeting and inclusive logistics.

Participant compensation is critical. It recognizes their time and contributions and should be based on local standards. Talk with community partners to determine fair rates and with your financial team to clarify how compensation, whether by check or gift card, will be delivered. Early conversations with participants or partner organizations can also help identify the most appropriate and accessible method.

Appendix B

File Storage & Material Sharing

Setting up an accessible, organized file storage system is essential for smooth communication and collaboration throughout the PA'LANTE assessment training. Here are key considerations:

1. Choose a Platform Participants Can Use - Select a storage platform that aligns with participants' comfort and access levels. Consult with them beforehand to identify preferred and familiar tools. Common options include:

- ***Google Drive*** – widely used, allows easy sharing and collaboration, and doesn't require a paid account.
- ***Dropbox*** **–** simple interface and good for file access across devices.
- ***Microsoft OneDrive*** **–** ideal if your team uses Microsoft Office regularly.

2. Ensure Easy Access & Permissions

- Create a clear folder structure with logical naming conventions.
- Share links with viewing or editing permissions depending on the purpose.
- If collaboration is expected (e.g., co-developing materials or note-taking), ensure editing access is granted.
- Consider creating a centralized "Training Materials" folder and clearly labeling subfolders by session, date, or topic.

3. Provide Technical Support - Even if participants have used platforms like Google Drive before, they may need help navigating shared folders or uploading documents. Support might include:

- A short walkthrough during the first session or a 2-minute how-to video.
- A one-pager with screenshots and step-by-step instructions.
- Having a point person available to help troubleshoot access issues before or during the training.

4. Accessibility

- Offer materials in multiple formats (e.g., PDF and Word) to accommodate different devices and assistive technologies.
- Avoid large file sizes that may be difficult to open on phones or slow internet connections.
- Use clear and plain file names that describe the contents.

5. Security and Privacy

- If storing participant information (e.g., sign-in sheets, surveys), make sure these documents are stored securely and access is restricted.
- Avoid using public links for sensitive documents.
- Regularly review and update access permissions to remove outdated or unnecessary access.

A thoughtful file-sharing system not only improves training logistics but also signals respect for participants' time, access needs, and comfort with technology. The more accessible and user-friendly the system, the more effective the overall training experience will be.

Appendix C

Assessment Planning Work Sheet

Brainstorm the following questions with the group and record the responses on large post-its. After the session write up the protocol.

1. Sampling: Who in the populations do we want to engage? Latinas in Hartford… but let's be more specific…

   a. Conditions?
   b. Ages?
   c. Affiliations?
   d. Neighborhoods

2. Sampling strategy: We will use non-random strategies. Which will work best?

   e. Snowball?
   f. Agency based?
   g. Convenience?
   h. Purposive?

3. Recruitment: How are we going to reach our sample? List the procedures we should use.

   i. Flyers?
   j. Texts/emails?
   k. Direct outreach?

4. Procedures: Step by step how are we going to implement the methods we selected? Depending on your method. Develop scripts for focus groups, agendas for photovoice sessions, questions for interviews and surveys for surveying.

Appendix D

Budget Planning Worksheet

Brainstorm the following questions with the group and record the responses. After the session write up the budget with the group responses.

1. What resources will we need to implement the assessment methods?

    a. Clipboards?
    b. Pencils?
    c. Cameras?
    d. Space?
    e. Recorders?
    f. Tablets?
    g. Other?

2. What logistical costs will we incur?

    h. Transportation?
    i. Parking?
    j. Snacks for focus groups?
    k. Childcare?
    l. Printing?
    m. Advertising?

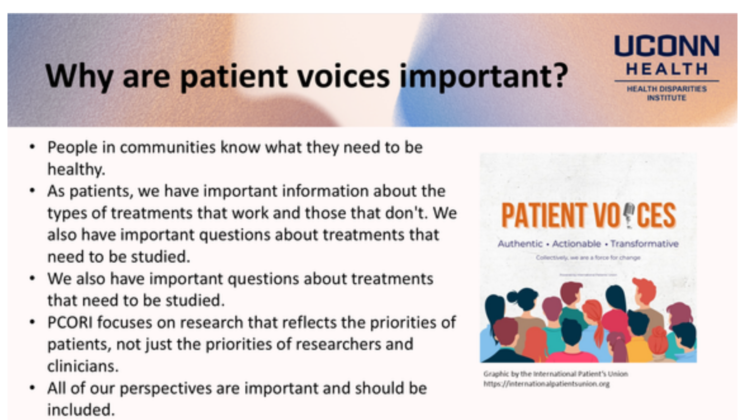
3. How much should we give participants for their time?

4. Will this take more of our time than is budgeted in our role? Do we need additional compensations

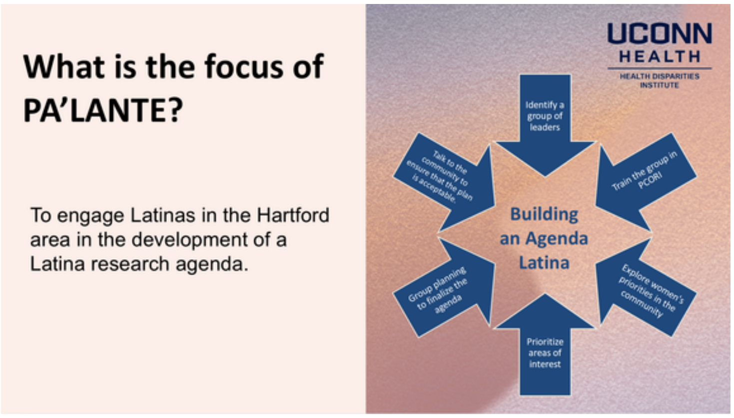
5. What additional expenses might there be?

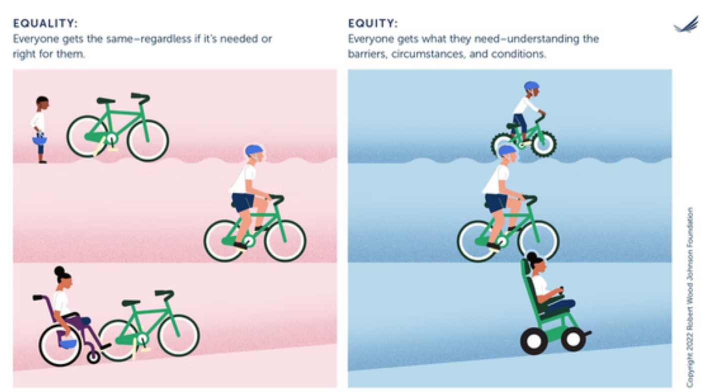
Appendix E

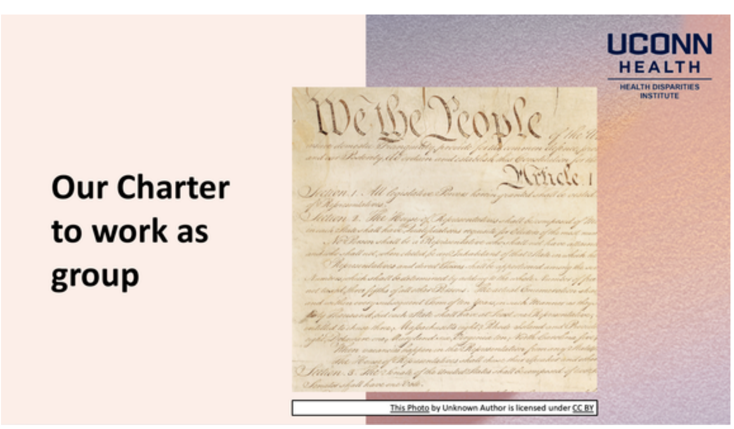
Session 2 Slides

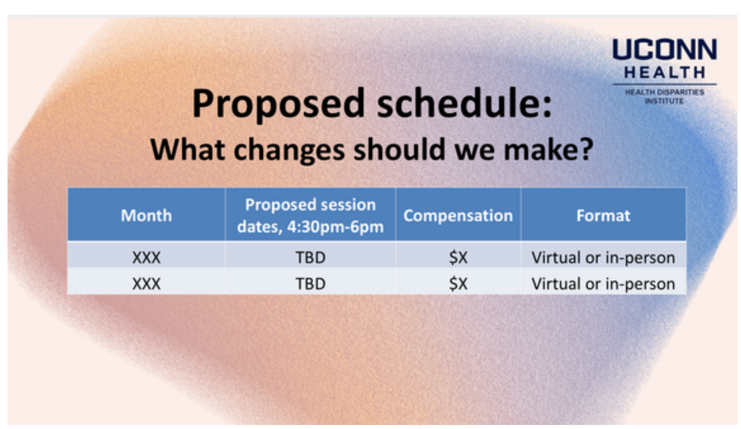


Appendix E: Session 2 Slides





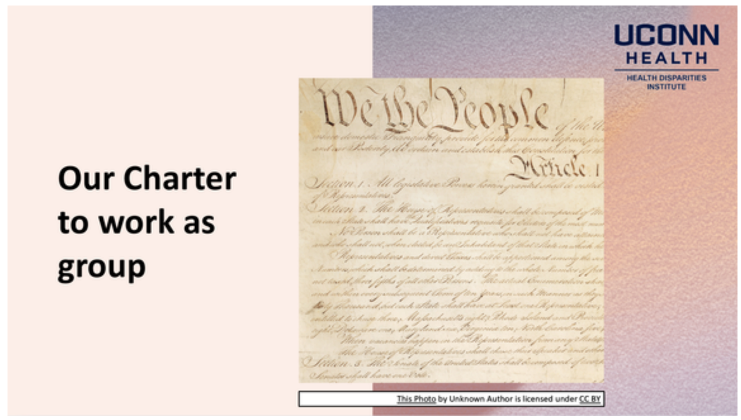


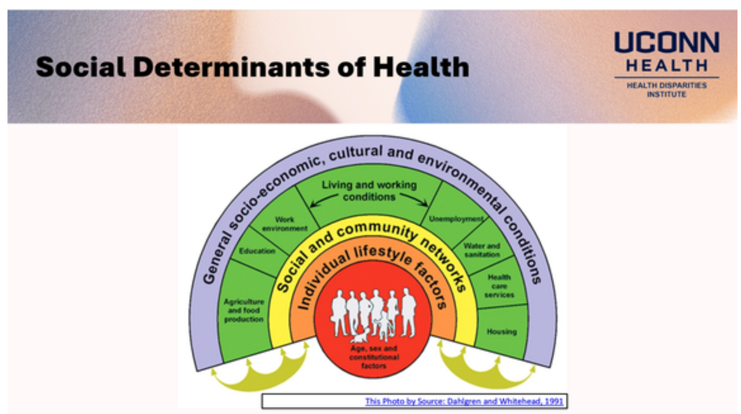


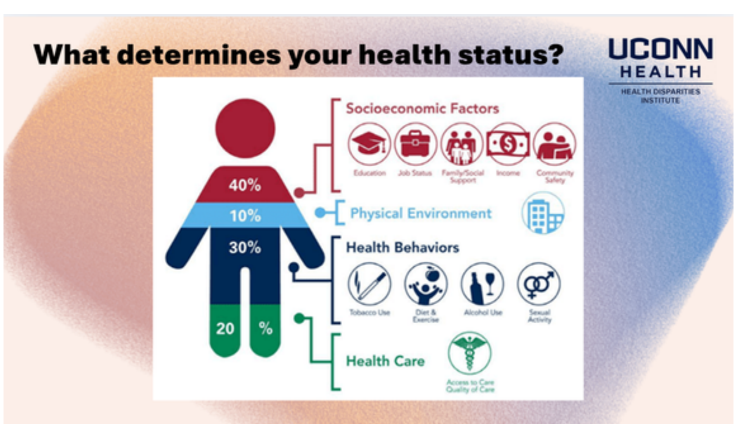
Month	Proposed session dates, 4:30pm-6pm	Compensation	Format
XXX	TBD	$X	Virtual or in-person
XXX	TBD	$X	Virtual or in-person

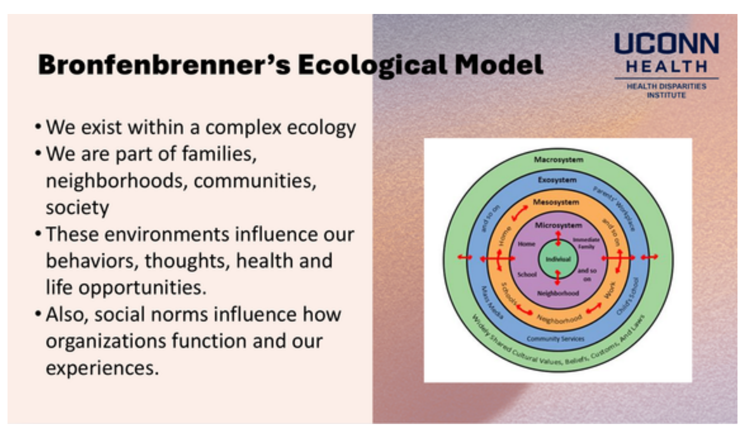
Appendix F

Session 3 Slides

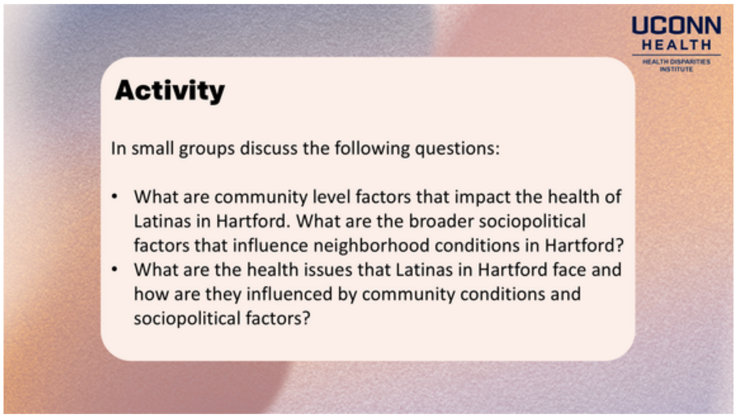


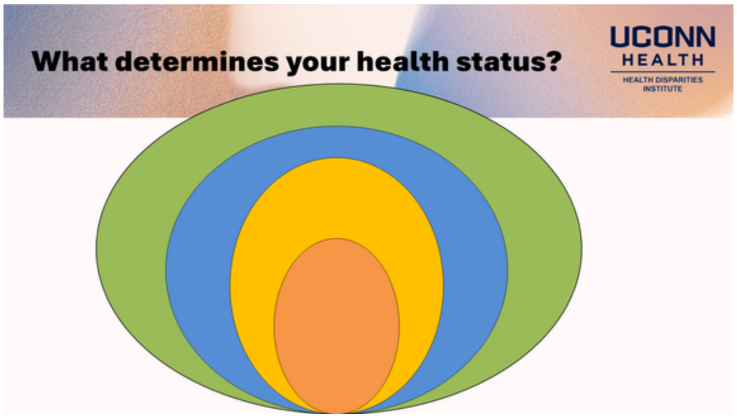






Appendix F:
Session 3 Slides





Appendix G

Session 4 Slides

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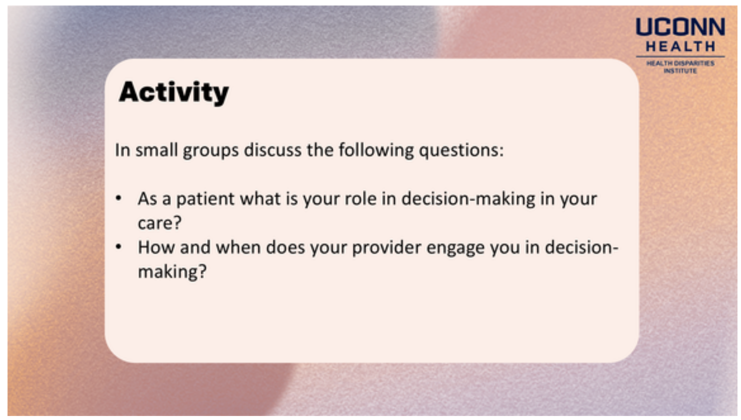

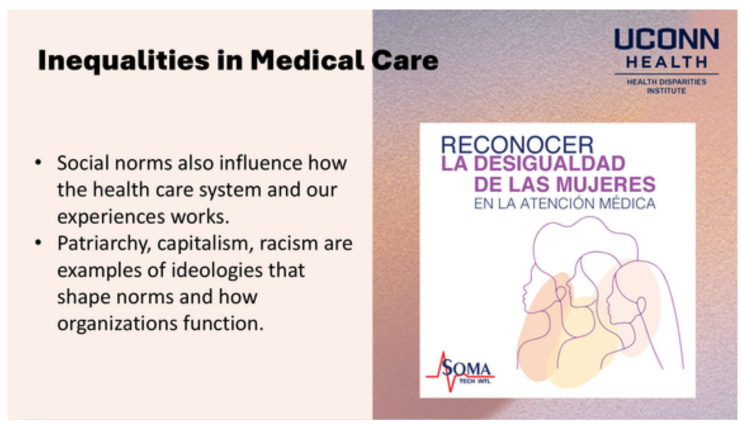

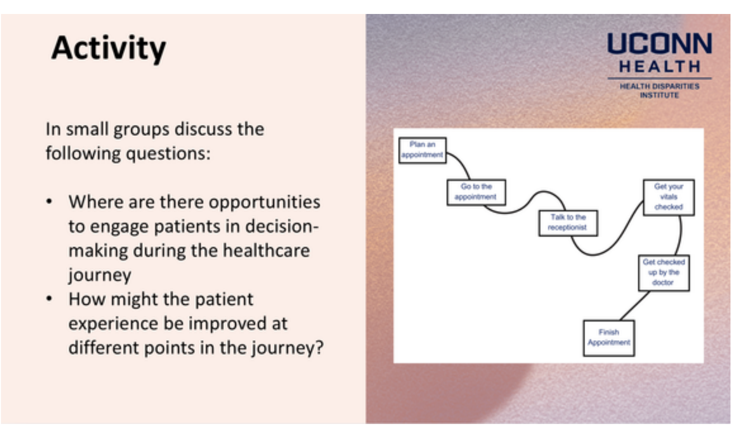

Appendix H

Session 5 Slides

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Pa'lante Orientation

Session 5:
PCORI CER & Agenda Setting

Champion Justice | Dismantle Racism | Advance Health Equity

Activity

In pairs discuss the following questions:

- When you have many options in front of you, how do you approach decision-making?
- What types of information do you need to make a decision?

Latina Health in CT

Latinas make up nearly 44% of Hartford's population—an essential part of the city's health landscape.

Key disparities affecting Hartford's Latina population include:
- Chronic disease management
- Maternal health inequities
- Mental health access
- Food insecurity
- Economic barriers

For more information go to Hartford Foundation Equity Profile

Activity

In small groups discuss the following questions:

1. What are the top three pressing health issues impacting Latinas in Hartford?
2. How do these conditions impact the lives of Latinas in Hartford?
3. What does available treatment for these issues look like in Hartford?
   a) Is it accessible and does it work for Latinas?
   b) Are there better ways to provide care to Latinas for this condition?
   c) Are there opportunities to engage Latinas in improving care for this condition?

Let's Decide

As a group we will identify shared priorities and uses consensus-building to determine which health areas the group will explore further.

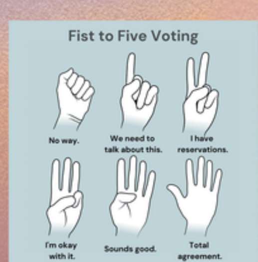

Image by The Meetingnotes Team

Additional Resources

- Hartford 2023 Equity Profile - Data Haven
- 2023 Hartford Foundation Equity Profile

Appendix I

Session 6 Slides

Pa'lante Orientation

Session 6:
Assessment Planning

Champion Justice | Dismantle Racism | Advance Health Equity

Assessment

- Assessment means…
  - Identify
  - Describe
  - Prioritize
- Social Assessment…
  - Seeks to subjectively define the health-related QOL problems & priorities in a given community
  - Involves self-assessment of needs & aspirations

The Community Toolbox, ctb.ku.edu

Why Assess?

- To understand the environment
- To understand public opinion, perceptions, priorities…
- To make decisions about priorities

Who to Include?

- Those experiencing the problem
- Service providers
- Community members & leaders
- Program planners and implementers

When to assess?

- You are planning to start a program
- You are implementing an initiative
- Efforts are being reviewed

The Community Toolbox, ctb.ku.edu

Methods of Assessment

Primary Data Collection

- Data can be both qualitative and quantitative
- Interviews, surveys, focus groups, observation, mapping, audits, photovoice

Secondary Data Analysis

- Data sets are often public but can be private as well
- Census data, state and local data, hospital and health center data, educational statistics, and land, water and air quality measures
- Many more depending on scope of work

Phases of assessment

1. Brainstorming: developing preliminary ideas
2. Using what you already have to answer your questions
3. Finalizing questions
4. Identifying your target population
5. Deciding what methods to use
6. Thinking about what is missing
7. Deciding if you have the resources to conduct the proposed assessment---IS IT FEASIBLE?

Appendix J

Session 7 Slides

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Pa'lante Orientation

Session 7:
Assessment Methods

Champion Justice | Dismantle Racism | Advance Health Equity

Phases of assessment

1. Brainstorming: developing preliminary ideas
2. Using what you already have to answer your questions
3. Finalizing questions
4. Identifying your target population
5. Deciding what methods to use ← WE ARE HERE
6. Thinking about what is missing
7. Deciding if you have the resources to conduct the proposed assessment---IS IT FEASIBLE?

Methods

- There are many ways to answer a question.
- Methods are the procedures we will use to collect the data we need to…
  - Answer our unanswered questions,
  - Understand the issue, and
  - Achieve our goals.
- We are going to focus on primary data collection methods.

The Community Toolbox, ctb.ku.edu

Methods of Assessment

Primary Data Collection

- Data can be both qualitative and quantitative
- Interviews, surveys, focus groups, observation, mapping, audits, photovoice

Secondary Data Analysis

- Data sets are often public but can be private as well
- Census data, state and local data, hospital and health center data, educational statistics, and land, water and air quality measures
- Many more depending on scope of work

Commonly Used Assessment Methods

- Surveys
- Key Informant Interviews
- Focus groups
- Photovoice

Surveys

- Are used to ask people questions to collect information.
- The are versatile
  - Can be completed in person, online, telephone, or mailed.
  - Both quantitative and qualitative.
- How they are administered and the type of questions they include impact feasibility and cost.
- The positive is that they can be quick and eas.
- The negative is that people can skip questions and responses often provide limited context.

Appendix J:
Session 7 Slides

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Interviews

A conversation with purpose!

Community ToolBox ctb.ku.edu

Interviews

- Interviews are different than a survey…YOU are asking the questions
- Interviews captures nuances and seeks to understand and assess things that can't be quantified.
- Interviews can get at the underlying realities of the situation, providing a way to understand the how and why while helping to make sense of the what.
- Interviews allow you to connect directly with the population and the community you're concerned with.
- Interviews are a way to involve the population of interest, or the community at large, in helping to assess the issues and needs of the community.
- Interviews often allow for a broader examination of the situation or the community than quantitative methods do.

Community ToolBox ctb.ku.edu

Key informant interviews and 1:1s

- Key informant interviews are often used in assessment and evaluation.
  - They are interviews with individuals who hold specific knowledge on a topic of interest or social phenomena.
  - They are generally semi structured but can also be open ended.
- One to ones are interviews that are often used by organizers to assess the local landscape while also building interest for an issue.
  - They are generally structured or semi-structured.
  - They are also interviews with individuals who hold specific knowledge on a topic of interest or social phenomena.
- Both can yield important data the difference is that 1:1s are explicitly designed for relationship building.

Focus Groups

- Combine observation and interviewing with facilitation
- Focus on what individuals say in the context of a group
- Different from what they might say or how might talk about it when alone
- Ask about perceptions, opinions, attitudes and beliefs
- Interactive; participants talk to each other
- Study people in a more natural setting
- Can help to gain access to cultural and social groups
- People who are unrelated but have something in common for which they are brought together
- Size: 6-10 people is a good number

Strengths and Limits

Advantages

- Group effect: data and insights that would be less accessible without group interaction
- Listening to others' verbalized experiences stimulates memories, ideas, and experiences in participants.
- Participants will use their own language/discourse to describe similar experiences.
- An opportunity for disclosure among people with something in common / similar traits in a setting where participants are validated.

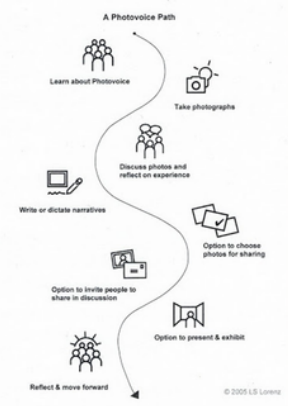
Disadvantages

- Less control over the discussion
- Can loose time

Photovoice

- Enables people to record and reflect their community's strengths and concerns
- Promote critical dialogue and knowledge
- To reach community leaders and policy-makers

"Photovoice is a method that enables people to define for themselves and others, including policy makers, what is worth remembering and what needs to be changed." (Wang, C.)



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Appendix K

Session 8 Slides

Pa'lante Orientation

Session 8: Sampling and Recruitment

Champion Justice | Dismantle Racism | Advance Health Equity

Population

- The whole group of individuals.
- Ex. All Latinas

Sample

- The group from the larger population you plan to engage.
- Studying a sample can tell us about the broader population.

Sampling

- The process of selecting a group from the larger population.

Sampling Strategies

Recruitment

- Recruitment is the strategy we use to engage our sample.
- What are a few ways we might engage our sample?
- In groups come up with a list of strategies you might use to reach Latinas in Hartford with diabetes, hypertension and or mental health conditions ?

Procedures

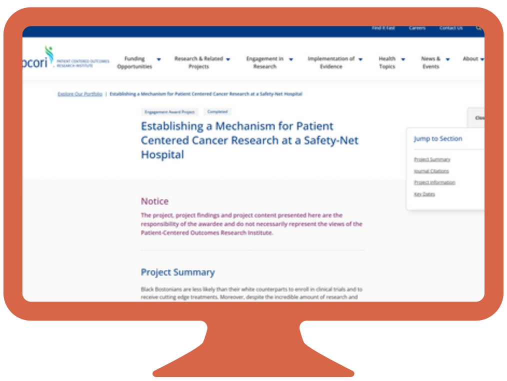
- These are the steps we will take to implement our assessment plan.
- We write out the procedures step-by step like a recipe to make sure that we are all doing things the exact same way.
  - **What would happen if we were all doing things differently? How might it impact our results?**
- As a team brainstorm the steps we can take to implement your assessment.
  - Include lots of detail.

Additional Resources

UCONN HEALTH
HEALTH DISPARITIES INSTITUTE

The Community Tool Box:

The Community Tool Box is a free, online resource for those working to build healthier communities and bring about social change. Our mission is to promote community health and development by connecting people, ideas, and resources.

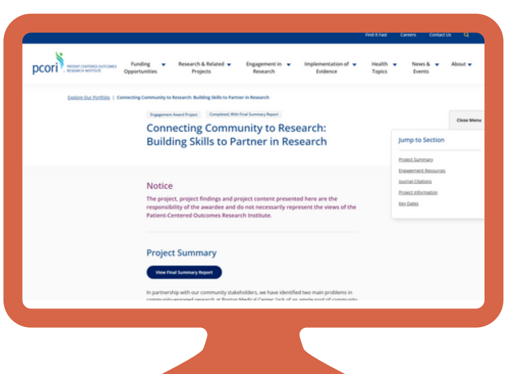


Establishing a Mechanism for Patient Centered Cancer Research at a Safety-Net Hospital

This project aims to establish a Patient Advisory Council (PAC) at a Boston safety-net hospital to elevate the voices of Black and Latino cancer patients in shaping patient-centered outcomes research (PCOR).

PCOR Toolkit for Community Behavioral Health Organizations Serving Latinos

This Toolkit supports Latino-serving behavioral health organizations in partnering effectively in patient-centered outcomes research (PCOR). It aims to improve care quality, community empowerment, health equity, and the sustainability of research efforts.



Connecting Community to Research: Building Skills to Partner in Research

This program trains diverse community members to engage in research and strengthens communication between researchers and the community. It will produce a community-informed training program and toolkit to support ongoing, inclusive research engagement.

***Disclaimer**: The statements presented in this toolkit are solely the responsibility of the author(s) and do not necessarily represent the views of PCORI®.*

***Acknowledgement**: This toolkit was funded through a Patient- Centered Outcomes Research Institute® (PCORI®) Eugene Washington PCORI Engagement Award (EACB-38982).*