Creating a Visual Map of the Study
ACTIVITY GUIDE WITH WORKSHEET

What You Need to Complete This Activity

- **A facilitator:** The facilitator should guide the discussion and keep the activity on track by using the instructions and worksheet. This role can be played by anyone on the team.
- **A worksheet note taker:** The note taker should capture the decisions made by the team on the worksheet throughout the discussion. Later, the note taker, with help from the facilitator, will help transform these decisions into a map.
- **A copy of the worksheet** for each team member.
- **A large drawing tool** (e.g., flipchart, whiteboard, computer screen) to capture each step on the map. If a computer is used, the image should be projected for the entire team to see or shared on screen if the activity is conducted virtually.

Your team will need about 1 to 2 hours to complete this activity followed by some time to create or revise your map and distribute it to the team for feedback.

Activity Goal

A **visual map** helps team members create a shared vision of how the study will happen and the steps necessary to achieve the team's common goal.

Creating a visual map can make it easier for teams to identify roles and responsibilities. By first identifying what needs to happen and in which order, teams can have more productive conversations about who will do the work, how, and when. This map activity focuses on the first part: what needs to happen, in which order. The team may revisit this map as the study progresses to address changes in the study and their impacts on partner roles and responsibilities.

Who Should Participate and When?

This activity is best done by the entire team. It is valuable to conduct the activity early in the team's formation, for example, when conceptualizing the study or writing the proposal. It is important that as many of the team members as possible—including stakeholders—be present and participate.

To fully participate in this activity, team members may find it useful to have an understanding of the research process. The Research Fundamentals training package uses plain language to explain each of the five steps in the patient-centered outcomes research (PCOR) study process.

Why This Matters

Creating a visual map can help team members understand the flow of the study—how each part of the study fits with other parts. Completing this activity can give team members a broad sense of what happens and when so that they can think about how they might contribute throughout the study. Stakeholder engagement across all study phases can lead to greater relevance, use, and uptake of research results by patients and stakeholders within the healthcare community.

Step-by-Step Directions

1. **Agree to complete this activity and worksheet as a team.**

2. **Assign the roles of facilitator and note taker.**

   a. The facilitator and note taker should review the instructions and worksheet prior to the meeting.

   b. The facilitator and note taker should meet briefly to confirm their roles and responsibilities.

3. **The facilitator should introduce the activity, explain its goal, and briefly describe roles. For example:**

   a. The goal of this activity is to co-create, as a team, a visual map of the study.

   b. Visual maps are a best practice of multi-stakeholder research teams to create a shared vision or a common goal for the study and provide greater clarity about the process, as well as the roles and responsibilities of team members.

   c. To create the map, discuss the set of questions on the worksheet as a full team.

   d. There are no right or wrong answers, and it is very important that every team member participates. Please ask questions and make comments to contribute to this discussion.

   e. Explain that this map represents an ideal plan for the study, and that the team may need to revisit and potentially revise the steps throughout the study.

4. **Working together, the team will answer each relevant question in the worksheet, depending on where the team is in the study process.**

5. **As the team agrees on the components of each step, the note taker can draw and, add to a new map (like the example provided), or another team member can help do this.**

6. **After the activity, the note taker, with help from the facilitator, will transform these decisions into a map and share it with the team for revision or approval.**

Additional Guidance for the Facilitator

- Don't get too far into the weeds. The goal of this activity is not to develop the research questions or define the study population, for example. The goal is to help the team understand the research process and how the steps fit together.
- Don't worry about deciding who should lead or contribute to specific steps or tasks during this activity.

Worksheet

Sample Map of a Patient-Centered Outcomes Research (PCOR) Study

The team may need to revisit the phases in this map as the study progresses.

Consider How Findings Will Be Used
- Discuss who will use findings and how they will do so

Plan the Study
- Research questions finalized
- PICOTS* identified

Get Funding and Approval
- Proposal written
- Funding secured

Finalize Study Plans
- Study operations planned
- Study approved by the IRB**
- Study sites established
- Study team trained
- Data management plan in place

Recruit Participants and Collect Data
- Recruitment plans developed
- Recruitment materials developed
- Study monitoring underway

Analyze Data and Determine Findings
- Statistical testing planned
- Data analyzed
- Findings assessed

Share Research Findings
- Audiences identified
- Publications and presentations prepared
- Other tools and resources created

**PICOTS = Participants, Interventions and Comparators, Outcomes, Timeframe, and Setting*
***IRB = Institutional Review Board*

Note: This map is a sample. Depending on where your team is in the study process, you may already have identified the research questions, written the proposal, and/or secured funding. In addition, your team's steps may look different depending on the type of study you are planning. In addition, steps may not always occur in the order presented, or steps may need to be revisited.

Worksheet

Discussion Questions:

The goal of these discussion questions is to help the team understand the flow of the study and to identify the basic tasks to be completed at each step. Keep the discussion broad; don't spend too much time trying to figure out specific details. Tailor the discussion to your team; for example, some aspects of steps may not apply to your project. And remember that some aspects of each step may need to be revisited as the study progresses.

1 **Consider how findings will be used.** How do we see the findings from our study being used by patients, families, clinicians, payers, healthcare administrators, or other stakeholders?

2 **Plan the study.** What will the essential characteristics of the study be? Think about broadly defining the PICOTS (Participants, Interventions and Comparators, Outcomes, Timeframe, and Setting). Don't worry if you haven't yet figured out all the aspects of PICOTS for your study; noting the PICOTS in this activity will give your team a sense of what still needs to be discussed.

3 **Get funding and approval.** Which funders might be interested in supporting the study? What broad steps does the team need to take to get the study funded and approved?

4 **Finalize study plans.** What broad steps does the team need to take to get the study approved by the Institutional Review Board (IRB), establish study sites, train study staff, and put a data management plan in place?

5 **Recruit participants and collect data.** How will the team reach the study population? For example, what types of recruitment materials will the team use? What strategies will the team take to retain participants in the study? What data collection strategies will the team use? How can stakeholders assist with recruiting and retaining study participants and collecting data?

6 **Analyze data and determine findings.** How will the team analyze data to address its research questions? How will stakeholders help make sense of the results and what they mean?

7 **Share research findings.** What kind of information will these stakeholders need? Where and how can they find information about the study findings? What are the activities involved in getting the findings to stakeholders?