**Focus Group Facilitation and Notetaking Guide – WIC STAFF**

### Background on WIC What Matters to You Project

In 2019, Public Health Solutions received funding from the [Hopkins/USDA Participant Research](https://www.jhsph.edu/departments/population-family-and-reproductive-health/projects/hopkins-usda-participant-research-innovation-laboratory-for-enhancing-wic-services/) [Innovation Laboratory](https://www.jhsph.edu/departments/population-family-and-reproductive-health/projects/hopkins-usda-participant-research-innovation-laboratory-for-enhancing-wic-services/) (HPRIL) to implement **WIC What Matters to You** (WMTY) a participant-centered WIC retention project that focuses on participants with the highest risk of dropping out of the program (children turning ages 1 and 2), identifies the highest priority needs of the parents and caregivers of enrolled children coming up on their first and second birthdays through a [“what matters to you”](http://www.ihi.org/Topics/WhatMatters/Pages/default.aspx) approach and connects them with services to address those needs by making closed-loop referrals to coordinated, accountable network of community-based partners. By connecting participants to services and benefits to address their highest priority needs we hope to reduce barriers to WIC participation, increase utilization of issued benefits, and improve rates of recertification for WIC.

### Project Goal

Evaluate a participant-centered approach to co-location and service coordination as a retention strategy, with a focus on the developmental stages where families are most at-risk for loss to follow-up.

### Project Objectives

**Objective 1:**

Systematically identify participant barriers to recertification and uncover social needs using a “what matters to you” approach by screening a minimum of 500 mothers or caregivers for all enrolled infant at 6-9 months and child at 18-21 months at intervention sites throughout the intervention.

### Objective 2:

Facilitate access of families with an identified need to available resources from a network of local services using a closed-loop electronic referral system.

### Objective 3:

Analyze improvement, through pre-post performance at intervention sites, as well as between intervention and control sites; analyze participant retention by level of engagement with other services and explore how the patient-centered approach and targeted referrals may both address barriers to participation and enhance the overall value of WIC after infancy

### Evaluation

The evaluation for this project will involve a quasi-experimental, mixed-methods approach. The two intervention sites for our project are **WIC-Corona** and **WIC-Ocean Avenue**. The comparison site for our project is **WIC-Ridgewood**.

### Focus Group Staff Roles

Each focus group will be staffed by one facilitator and one notetaker. Details about each person’s

responsibilities are outlined below.

### Role of Facilitator

### *Recommendation:* Check out this [Toolkit for Conducting Focus Groups](https://ctb.ku.edu/sites/default/files/chapter_files/toolkitforconductingfocusgroups-omni.pdf)

### Introduce self and notetaker to the group; facilitate quick intros

### Facilitate the conversation

### Keep the group on time

### Record the meeting in RingCentral

### Thank people for coming at the beginning and the end

### Review the purpose of the group and the goals for the meeting

### Go over the flow of the meeting

### Elicit opinion, don’t judge it

### Make sure that all opinions on each question get a chance to be heard

### Summarize what you think you heard, and ask if the group agrees

### Phrase the same question in a different way, use probes

### Ask if anyone else has any comments on a question

### When all your questions have been asked, and before the group ends, ask if anyone has any other comments to make

### Ensure everyone gets to participate, the conversation shouldn’t be dominated one or two individuals

### When encountering a dominant personality, you can shift attention to other speakers, by calling on them by name to share their opinion

### If someone is more reserved, you can invite this person to answer a question; encourage them with smile and nods

### Ensure participants that their individual opinion is essential to the success of the focus group

### Keep the group and discussion on topic

### If the conversation is going off topic, wait for a breath or pause, quickly interrupt, and call on another participant or bring the group back to the objectives. Repeat the question

### Role of Notetaker

### Introduce self to the group

### Help the facilitator keep the meeting on time

### Let the facilitator know when 45 mins left (half way through), 15 min left, 5 min left through 1:1 chat in RingCentral

### Record the meeting using a backup method (e.g. voice memo on your cell phone)

### Capture key quotes and major themes of the discussion

### Ask for clarification if you don’t understand something someone said

### If you weren’t able to understand something, ask people to repeat or clarify what they said

### In addition to verbatim notes and quotes, write down contextual notes about the focus group

### Note impressions or insights that describe the “feel” of the focus group

### Did people enter late or leave early?

### Were people particularly interested in any specific question?

### Any non-verbal agreement or dissent?

### Finalize notes (cleaning and adding reflections) within 24 hours of the focus group

### Clearly delineate between verbatim notes and your perceptions/reflections in the notes

## \*INTRODUCTION\*

**FACILITATOR:** I am going to start recording the meeting now. The notetaker is also recording the meeting so we have a backup. **[START RECORDING THE MEETING]**

Hello, my name is [FACILITATOR NAME] and I will your facilitator today. We are also joined by [NOTETAKER NAME] who will be taking notes during today’s focus group. *Facilitator and Notetaker should also feel free to mention role at PHS in intro.*

The purpose of this focus group is to learn more about your experiences as part of the WIC What Matters to You project. Your participation is completely voluntary; you can choose to leave the RingCentral Meeting at any time with no impact.

This focus group will be recorded and later transcribed.

During the course of today’s focus group I will ask you questions about the “What Matters to You” conversation questions, then we will move into your experience using Unite Us, after that we’ll ask about your thoughts on how impactful you think this project has been/will be, and finally wrap up some questions about what you think the next steps for this project will be.

A couple of things to note before we get started:

* The group will run for about 90 minutes. I’ll be keeping track of time and our notetaker, [NOTETAKER NAME] will also be helping us keep track of time so we can end on time.
* I want to make sure we hear from everyone so I might end up calling on individual people who haven’t been speaking up very much, just to make sure we hear from everyone. It doesn’t mean you did anything bad or wrong.
* I might ask you to explain a little more or give examples, so just we all really understand your perspective. It is not a reflection on what you shared.
* There are no right or wrong answers here. All perspectives are welcome, as long as we are all respectful of one another.
* You don’t have to turn on your camera if you don’t want to.
* You can leave at any time. Your participation is encouraged, but completely voluntary. Are there any questions before we get started?

## [PAUSE FOR QUESTIONS FROM THE GROUP]

Are we okay to proceed? **[Ask for an audible “Yes” from everyone]**

**Section 1. What Matters to You Conversation**

**FACILITATOR:** Now, we’re going to move on to talking about the WIC What Matters to You

Conversation. As a reminder, these were the questions:

**WIC What Matters to You Conversation Questions**

Question 1

1. Are you facing any issues right now that make it hard for you to take care of yourself or your family?
2. What would you most like help right now?

Question 2

1. What are the difficulties you have been going through lately?
2. How can we help you?

Question 3

1. Which are some of the services that would help you with some of the difficulties you may be going through?

## [ASK THIS QUESTION IN THE QUALIFIED NUTRITIONIST FOCUS GROUP ONLY]

1. Late last year and early this year, we asked you to out and provide feedback on different kinds of questions to identify “what matters most” to participants. What do you remember about that process?
2. Can you tell me about your experience using the WIC What Matters to You questions with participants?
	1. Probe: How did the questions impact your ability to identify participants’ needs?
	2. Probe: How did you modify or rephrase questions when talking to participants?
	3. Probe: How did the experience of using the WMTY questions compare to conversations before the questions were available to you?
3. How did the “what matters to you” conversation impact your ability to serve your participants?
	1. Probe: How did participants responses impact your ability to make referrals to address their needs?
4. Would you like to continue using the WIC What Matters to You conversation questions with participants to identify their referral needs? Why or why not?
	1. Probe: What other ways would you like to use to collect participant’s referral needs?

### Section 2. Using Unite Us for Referrals

1. Can you tell me about your experience using systems other than Unite Us to make referrals for participants?
	1. Probe: Can you tell me about your experience using systems other than Unite Us to make referrals for participants?
	2. Probe: Can you tell me about your experience using Resource Pass?
	3. Probe: How do you track the referrals?
2. Can you tell me about your experience using Unite Us to refer participants to services in the community?
	1. Probe: What did you like most about the system and workflow? What did you like least?
	2. Probe: How easy or difficult was it to identify the eligibility criteria when making referrals?
	3. Probe: How easy or difficult was it locate appropriate services or partners in the platform and refer participants?
3. Can you compare your experience referring participants through Unite Us to processes you used before (e.g. Resource Pass)?
	1. Probe: Do you find it easier or more difficult to refer participants, communicate with community partners, and/or track participant outcomes now, compared to before Unite Us was in use?
4. What would you change, if anything, about Unite Us?
	1. Probe: What changes could be made to improve the system and make it easier for you to use?

### Section 3. Perceptions on Impact

1. How do you think the “what matters to you” conversation impacted your participants’ satisfaction with the visit/the services they received?
2. How did the referral process in Unite Us impact your ability to serve your participants?
3. How do you think the conversation and/or the referral process will impact participant retention in the WIC program?

### Section 4. Sustainability

1. If we did this project all over again, what would you have liked to be done differently?
	1. Probe: What modifications would have made the project easier to implement? For example, more time per participant, collecting information via paper or form in the waiting room, changes to workflow for identifying participants?
	2. Probe: What were barriers to implementation? How could they have been overcome?
2. What aspects of this project, if any, should be retained and made part of WIC practice (across PHS? Across New York State? Across the Nation?)
3. What do you see as next steps in improving referral practices in Neighborhood WIC?
4. In addition to improving referral practices, what are other aspects of supporting patients that would benefit from a targeted project?
5. What do you see as next steps in strengthening the partnership between community- based organizations and WIC?

## \*WRAP UP\*

**FACILITATOR:** Any final comments on anything we discussed before we wrap up the meeting?

## [PAUSE FOR FINAL COMMENTS FROM THE GROUP]

Thank you everyone for your time and feedback today. Your comments are critical to understanding the impact of this project. The recording of today’s focus group will be recorded, transcribed, analyzed, and be one piece of several in the overall evaluation of the WIC What Matters to You project. Final results for the project should be available in Summer 2021.

Thank you again for your time. I will now stop the recording. **[STOP THE RECORDING]**