Technical Report:

Research Process – Penticton LEC

2023

Audience:
This report is a detailed look at the findings, the methodology, limitations and reflections on the process The audience for this report is decision makers, funders or researchers who are interested in how this work was conducted.

Land Acknowledgement:

We gratefully acknowledge that this research was conducted on the traditional, ancestral, unceded territory of the Okanagan (Syilx) People.

Funders:
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Forward

"Without a proper understanding of how and why people end up homeless, most people have no idea how broad... the risk of becoming homeless [is]. There is a huge fear of the homeless from the public at large. So many of us PWLLE have mental health issues coupled with addiction issues...It makes it hard for meaningful interaction for everyone. We need to destigmatize and humanize us (PWLLE) or it will keep failing. I feel that it is absolutely crucial that the input of peers and peer groups count. We are the ones that have first-hand knowledge. I have lived it. Not <u>for</u> us, but <u>with</u> us."

- Reflections of Shawn Kelly, lived experience co-researcher

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Overview

This report was developed to support the work of communities, researchers and others who are interested in community engaged processes for making social change. The technical report is a companion piece to a Community Report and a Toolkit for creating community based Lived Experience Circles (LECs). The technical report focuses on the "how" of the work that was done. This includes a framework for integrating Lived Experience voices into the research (Allyship in Research Framework), the research approach from our project, and tools we used for data analysis.

Below are some suggestions for how this technical report might support the following audiences.

Communities – Based on our research, we feel that LECs will be of most use to smaller urban centres and rural communities. LECs that serve the entire community can be effective in sharing resources, members, and time, as well as reducing the barriers to accessing the voices of people with lived/living experience (PWLLE) of homelessness. This technical guide will provide you with an overview of how the research project came to be, how it was funded, and the research approaches we used. Municipalities or backbone organizations should be able to use this technical report along with the companion toolkit to engage in a community conversation to determine if/how an LEC could support your community needs.

Researchers – There are many academic articles which support the use of LECs in organizations to achieve better outcomes for programs, projects and research. In addition, there is a large body of work to support Community Engaged/Based Research. There is less written on the practicalities of merging these two together. This technical report, in conjunction with the Toolkit, aims to give practical insights into how this work is done. We have included examples of tools we used and how they worked (or mostly worked) in the hopes that others can use our experiences and build upon them. For researchers new to working with PWLLE in community-engaged research we hope this helps to answer some of the questions we had when we started the project.

Funders – Funders are often left out of conversations around these types of projects. This technical report can funders some insight into how involved community-engaged research can be, and why it is so important to have funders who understand the time, resources and relationships involved. This technical report may also be something that funders could refer to organizations or researchers who are looking to do this work in the future and may be struggling to find a place to start.

Project Description

This research project set out to investigate the potential to create a group of individuals with lived or living experience of homelessness (PWLLE – People with Lived/Living Experience) to guide the community of Penticton as it looks to collaboratively address homelessness. The project would gather local expertise and knowledge and combine that with existing information from other similar projects and the research literature. The outcomes from this project were to be a community report (to identify the recommendations from the study), a technical report (to help other communities and researchers to do this work) and a Toolkit (to provide an overview of how to construct a lived/living experience circle).

Project Team

The research team for this project was comprised of an interdisciplinary group that brought together academic researchers from different disciplines, community researchers with lived experience and a student researcher with lived experience (See Appendix A for Team Bios).

Project Goals/Objectives

The core goal of this project was to explore whether there was a perceived need for a lived/living experience group that would serve the community of Penticton. In addition, there were three other research goals:

- To understand how a lived/living experience group could help address homelessness in Penticton
- To understand how to define success for a lived/living experience group
- To understand what might be required for such a group to be sustainable in Penticton longer term

Methodology

This research looked to build on previous work from literature, practice, and past research projects conducted by members of the research team locally. In this section we will discuss the overarching principles that guided the design, analysis, and translation of this research as well as an overview of the research process.

Guiding Principles for this Research

During the design of the research project there were several concepts guiding our work, namely:

- Adhering to Community Engaged Research Principles to ensure the project was embedded in the community
- Using the Allyship in Research Framework[1] to ensure lived experience co-researchers were active and equal partners in the project
- Learning from existing examples in our community by consulting experts in, and members of, lived experience groups
- Engaging in Knowledge Mobilization that created useful and impactful outputs to community

Adhering to Community Engaged Research Principles / Allyship in Research Framework

Community-engaged research (CEnR) or community based participatory research (CBPR) are approaches to research that look to ensure that community is centered within the research being conducted (Wallerstein, et al., 2020). It seeks to reduce traditional inequities between the researcher and the “researched”. This work is often seen as more practical or applied in nature and “… aim[s] to prevent stereotyping, stigmatizing, or other research practices that have historically harmed communities” (Wallerstein, et al., 2020, p. 380).

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[1] The framework (https://colinreid.sites.olt.ubc.ca/files/2021/08/Allyship-in-Research-Toolkit-August-9-2021.pdf) and supporting videos (https://khrc.ok.ubc.ca/resources/community-reports-and-summaries/) can be found on the Kelowna Homelessness Research Collaborative website www.khrc.ok.ubc.ca or the Homeless Hub https://www.homelesshub.ca/resource/allyship-research-toolkit

This project was identified through conversations with the United Way and members of the Social Development Department in the City of Penticton. These two organizations with the addition of ASK Wellness, which provides services to people with Lived/Living Experience of homelessness (PWLLE), formed the steering committee for the project and were engaged in setting the research agenda for the project. They were also actively involved in suggesting participants to invite to the study. reviewed contact lists to ensure we were not missing any critical organizations and participated in the writing and editing of the final reports

Using the CEnR approach in this project, voices of PWLLE were included through a diverse research team and active involvement in the research design. The project utilized a framework outlined in the Allyship in Research Toolkit (Myrah, Rempel, & Laing, 2021) developed by a research team based in the Okanagan. This framework has been used in other research projects involving PWLLE as co-researchers.

The framework consists of 5 guiding principles and 8 components critical to research projects. The guiding principles ensure our interactions, approaches to communication, and processes minimized the power differences between the research team members. Each research component of the framework outlines how PWLLE can be included as full participants in the research process and highlights areas where challenges may occur.

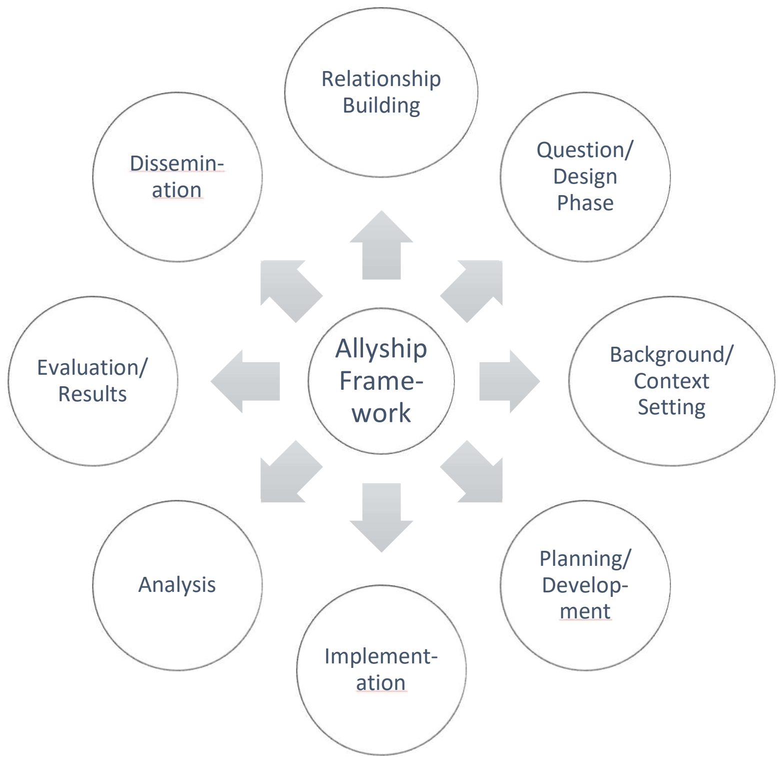

Figure 1: Allyship in Research Framework (used with permission)

Finally, the authors of the framework identify multiple benefits to using this approach. The reliability and validity of data improve when PWLLE are included in research centred around them. Participants and other PWLLE are more ready to accept results of the work when they are included and contribute to the work. Their contributions give an authenticity to the work which leads to future collaboration and enriched, far-reaching impacts and outcomes (Myrah, Rempel, & Laing, 2021, pp. 14-15).

Appendix B provides a comprehensive discussion of how the Allyship in Research framework was employed and some of the benefits and challenges related to doing work in this way. describes how all members of the research team were included in this research project.

Learning from existing examples

The research team spent extensive time combing the research literature and trusted practitioner websites and resources. We were looking for examples describing the integration of PWLLE into advisory or other groups. We wanted to understand the roles these individuals played, what kinds of projects they were involved in, and how these opportunities were structured. While a comprehensive overview of what we found is outside the scope of this document, you will see that these materials have influenced our results by reviewing the citations and the reference list at the end of this document.

We also learned as much as we could from other local examples of lived experience groups. We used interviews conducted with the Kelowna Lived Experience Circle on Homelessness (LECoH) and service providers, reviewed data from previous research projects involving LECoH, and asked participants in our focus groups for relevant examples of how lived experience plays a role in the community of Penticton.

Research methodology

This project brought together individuals from the community and academic researchers to create and execute research. Guided by a steering committee, past research projects, the expertise of the research team and a literature review, it was determined that focus groups and interviews would be the best approach to gather the required information. The research project and approach was also reviewed and approved by the Okanagan College Research Ethics Board.

The research project was proposed to collect community feedback about three topics: 1) whether there is a role for a lived experience circle in the community, 2) if so, what type of role it should play, and 3) what would be needed to sustain this kind of circle. We were guided by the Allyship Framework, in which lived experience co-researchers play an essential role in every aspect of the project, from conceptualization to final outputs.

To gather community specific information, two focus groups were conducted. The first gathered the perspective of community organizations, funders, government stakeholders and community at large. The second was held to gather feedback from individuals in Penticton with lived experience of homelessness. Interviews were conducted with experts in Lived Experience groups. These included PWLLE as well as service providers and researchers. Analysis of the data was done collectively by the research team.

To do this work, we focused on the relationships at the core of our research. This required flexibility within a structured approach to data collection. There were five notable focuses for our project: <u>creating space for the research</u>, <u>building relationships with the community and developing the research team</u>, <u>carefully facilitating discussions to collect data from both groups</u>, <u>analyzing that data</u>, and <u>mobilizing the knowledge gleaned from data analysis</u>.

Creating space

Having appropriate space that is welcoming and safe for all participants is key to doing community-engaged projects. We were fortunate to have strong support from the Penticton campus of Okanagan College, which welcomed the research team and community participants into physical meeting spaces.

> **Challenges:** Having access to physical can prove difficult. While virtual spaces allow for researchers to minimize barriers to collaborating, some PWLLE will require support with online tools and data storage, and may not have the required computer/video equipment. Consider building these technology costs into project budgets.

The research team met and worked together virtually which was facilitated by College resources. The project used existing online technology (i.e. Microsoft Teams) that were available through Okanagan College. A Teams 'room' dedicated to this specific project was set up and functioned as communication tool (video and chat) as well as data repository and common writing area. It is important to note that with secure networks such as those at Colleges or Municipalities, it may be difficult for researchers outside of the organization to access shared online documents and data. Not all of the co-researchers had access to adequate technology (computer, video camera, microphone) to be able to participant in our meetings initially. We recommend building technology costs into any funding requests for these types of projects.

When choosing physical space, we used guiding questions to help us with selection.

1. Does the physical space meet the requirements of the activities?
2. Do all participants see this space as 'safe'?
3. Is the space accessible (transit, bike route, central location, accessible for mobility challenges)?
4. Is the cost within our budget?

Building relationships with the community and developing the research team

Creating the research space is not limited to physical space. Developing key research relationships is important and requires considerable time. Our relationships were either internally focused (directly related to the research team) or externally focused (related to outreach into the community).

Internal Relationships

This research originated from conversations with organizations in Penticton and Okanagan College Researchers. Because there was an existing relationship between these groups, it did not take long to identify the core goals of the project, identify funding partners and initiate the project. In other communities this may take longer to occur. We were quickly able to identify who would be on the steering committee and generate recommendations for community researchers with lived experience.

Two individuals with lived experience joined the team as co-researchers. It also took time to adjust existing systems to ensure adequate support for lived experience co-researchers (e.g., establishing invoice and payroll processes, securing computer access, and so forth). Once the research team had formed, we discussed the timeline and goals of the research project. During this planning phase, lived experience co-researchers used their expertise to design focus group sessions that would be welcoming, safe, and productive for PWLLE and service providers. We clarified and refined our three discussion topics, adding prompts and examples to help guide discussion.

External Relationships

It was important to reach out to community agencies serving PWLLE. We built a contact list of key community agencies and other stakeholders. This facilitated invitations to participate in stakeholder discussions later in the research process, as well as gathering referrals of PWLLE who might want to join the research team. In identifying PWLLE at a stage of their journey that would permit regular participation on a research team, and referring them to us, community agencies *became partners* in the project. We used their referrals to connect with prospective co-researchers, and we spent time developing relationships with those individuals. Given the nature of the work, taking the time to establish trust in our relationships was essential.

Data collection

The next stage involved data collection. As a team, we decided to hold two focus group discussions – one with service providers (community agencies and other stakeholders), and another with PWLLE. We carefully considered practical details such as physical space, accessible facilities, and food, to create a space where people would feel safe and welcome. We then reached out through email (or phone as appropriate) to our lists of prospective participants, using referrals from our steering committee, other community agencies, and our own contacts. On November 25, 2022, 15 service providers participated in a focus group meeting on the Penticton campus of Okanagan College. On February 24, 2023, 12 PWLLE participated in a focus group discussion at the United Church in downtown Penticton.

In each focus group session, participants seated themselves at one of two large tables. Each table discussion was co-led by both a lived experience and Okanagan College researcher. In the morning, participants addressed: 1) whether there was a role for a lived experience circle and 2) what that role could be. The two topics were separated by a coffee and refreshment break. After lunch, participants discussed what would make a lived experience circle sustainable. As focus group participants discussed topics, their responses were anonymized (no names) and recorded verbatim on flip charts. Flip chart sheets were posted on the walls in sequential order, digitized, and then transcribed into Word (.docx) files. The research team anticipated numerous challenges conducting focus groups with PWLLE. Some were structural – for example, developing processes to dispense and track cash honoraria (extremely important for participants who may not have access to a bank account). We were mistaken in some of our expectations regarding challenges. For example, we anticipated that PWLLE would be more comfortable meeting in the community (rather than at Okanagan College) and would prefer payment at the beginning of the session (to avoid feeling coerced into participating). Participants clearly expressed that they would be perfectly comfortable meeting at an educational institution and that payment after the session would be a more appropriate way to recognize the value of the work completed.

Data analysis

In the next stage, the research team analyzed the collected data transcripts. The data transcripts consisted of compiled lists of feedback from the focus group sessions. Three different approaches to analysis were attempted in this project. The first method prioritized doing the analysis individually, the second focused on doing the analysis as a group. The third method involved some cross-validation by interviewing members of an existing LEC.

Approach #1 – Independent Analysis: This involved each researcher independently reviewing the data and developing a list of themes or topics that reflected multiple participant statements. This method was used in order to ensure that the voices of the research team members with lived experience were not overshadowed by the academic researchers. By having each person individually analyze or make sense of the data, we hoped to create independent streams of themes which could then be themed together.

To do this analysis, the team utilized a theming template attached in Appendix C: Data Analysis – Community Focus Groups. Training was provided on how to utilize the theming template. Over the course of several weeks, individual team members were encouraged to complete the template. While all research team members felt comfortable using the template (electronically or on paper), actually doing the work independently created a barrier for some team members. Only the first focus group was analyzed using this method, and not all researchers completed the analysis on paper. Some barriers the team expressed were finding the time to do the analysis. As this work was not a regular job for either of the lived-experience co-researchers, and this process was new to them, they found it difficult to find the time to dedicate to the work. A second barrier was the template itself. One of the lived experience co-researchers had very little practice in using a computer to fill out documents. While they had the skills, there was concern that they would do something 'wrong' and so preferred to use paper. A third barrier was confidence in their abilities to do the analysis. While each researcher was reassured that we would work together on the final project and that we wanted to hear each individual voice, not everyone was confident that they were 'doing it correctly'.

Barriers to Independent Analysis

- Finding the time
- Using the template
- Confidence in ability

Approach #2: Group Analysis: To address the shortcomings of the individual or virtual data analysis, we pivoted to in-person analysis for the second focus group and final analysis pieces. We met on the Penticton campus of Okanagan College to 'theme' the data collaboratively. Statements were printed on individual sheets of paper, which were then clustered together thematically on the walls. Once statements were clustered, we found the theme each cluster reflected. Then, themes were integrated across service providers and PWLLE.

It is important to note that our time frame for data analysis had to be extended to accommodate a shift to in-person meetings (with the attendant scheduling issues), to allow for the research team to develop our data analysis skills, and to reflect on the effectiveness of our methods as we proceeded. In discussion with the research team, it was noted that doing analysis whether on paper or f2f would be easier the second time. As this was the first time this group of researchers had worked together, they had little common experience working together to make sense of the data. In the future, it was felt that the individual data analysis could again be attempted with different results.

Approach #3: Cross-Validation: To further support our analysis of focus group data, the research team interviewed members of an existing lived experience circle on homelessness (LECoH) in the neighbouring city of Kelowna. Insights from these interviews were added to the summary of data from our focus group meetings. The feedback from these interviews also confirmed much of what we had gathered from the focus groups.

Knowledge mobilization

The final stage focused on knowledge mobilization. In this stage, we focused on translating our findings so they would be useful to the community. In addition to this technical report, we produced a community report, outlining in plain language how we conducted the focus groups and what they told us. We developed a toolkit – including an engagement framework - as a starting point for any community that might want to convene a lived experience circle. The toolkit draws on practical recommendations from the literature, themes from our data, and past experiences of other community-wide lived experience circles. It includes an engagement framework, which provides a specific matrix for accessing a lived experience circle at different levels of intensity. This technical report, designed for funders and other decision-makers, provides a more comprehensive overview of the research process and findings. The contents of these reports, in addition to being publicly available, have also been shared in community conversations and presentations at applied research conferences.

Limitations & Strengths

The following section outlines limitations (and what could be done to mitigate those limitations) and strengths of the work done on this project.

Limitations

This project has a number of important limitations. First, our findings are based on a limited number of members who volunteered to participate. Members of our sample of PWLLE were referred if they had lived (as opposed to living) experience with homelessness, and so they may be less representative of the views of people currently living with homelessness. In addition, while we suspect that the data reflects much of the voice of community, there were community groups missing. Few formal representatives of the 'public' (those not involved in the social serving sector) were missing, as well as more formal representation from First Nations communities.

Limitations

- Limited number of referred participants
- Only one community involved
- Outcomes are reflective of this research project and process

Second, the engagement framework is based on the insights of PWLLE and service providers in Penticton, and so it may be less relevant in other communities whose characteristics differ markedly (e.g., in population, social issues, existing resources). While we believe that this work has applicability to communities smaller than Penticton (and more rural communities), more work to confirm this is needed. Third, participatory research, by definition, has uncertain outcomes. We outline a research process and its findings with the hope that they will prove helpful in other communities, but due to the variability and nature of this research 'in the field', not every community will have the same outcomes as this project. A different composition of research team members, relationships, funders, and stakeholders may produce different results.

To overcome these limitations, several recommendations are provided.

- The number of focus groups could be expanded to collect more data from the community being studied. This would ensure that after each focus group, a reflective exercise could identify missing voices and perspectives and more effort to include those groups could happen.

- This research team is already exploring opportunities to partner with other communities to have similar conversations. The more communities that explore this approach and framework, the more we can understand if there is widespread applicability to this work.
- Finally, we recommend spending time to grow and build the research team. There is no shortcut to developing an understanding of the team and the work being done and it takes longer than you anticipate to complete seemingly simple tasks. It is also important to build relationships with your stakeholders and funders. Because we had strong working relationships with both groups prior to engaging in the research, we experienced fewer miscommunications and setbacks than other projects. It is also important to fully understand the motivations of the stakeholders prior to commencing the work.

Strengths

Despite the limitations, there are important strengths to be highlighted. First, the relationships built between the research team, stakeholders, and the community due to the project and outcomes is a strength of the research approach. These relationships, focused on addressing social issues, will not terminate with the end of the project and have the potential to spark additional research projects. Second, the community building among participants that occurred during focus group meetings will continue once the project ceases. The building of relationships between participants was an unexpected outcome of the project. Whether due to the position of the research post-pandemic or the turnover in staff and leadership in organizations, this research was uniquely positioned to bring new people together and spark new relationships. Third, though our research process and engagement framework are specific to our setting, they do set the stage for other communities to seize upon opportunities to engage lived/living experience in tackling social issues. The framework and process are shared in some detail to encourage other researchers to take these ideas and build upon them.

Conclusion

This technical report was created to support those looking to incorporate PWLLE into research, decision-making or the creation of programs/ projects. The presentation of the Allyship in Research Framework can support communities and researchers in involving PWLLE of homelessness or other social issues (poverty, addiction, mental health challenges, etc.) in projects from the start of the work, through to the evaluation. Appendix B: Applying the Allyship in Research Framework, provides examples of how this framework was used to guide this project. In addition, this report shows the research process and provides examples of how data analysis can be done with a diverse research team including PWLLE.

In conjunction with the Community Report and the Toolkit, we hope to inspire other communities to consider incorporating a community focused LEC to help address not only homelessness, but other connected and related social challenges.

References

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Appendix A: Research Team Bios

Shawn Kelly

Journeyman Chef. Want to use my experiences in homelessness that I experienced in my life, to shed more light on this situation from my perspective. A person who has lived it. Experienced homelessness in my teenage years and other points in my life. For example, when I lost my wife in 2015 from multiple sclerosis. As well as suffering a major injury falling from the roof of a 2-story building. In which I had a major relapse into my addictions. I lost everything.

Bobby Hines

I was introduced to the research team through my employer, Ask Wellness Society. I wanted to contribute to meaningful solutions to homelessness. I have lived experience with homelessness and addiction. I now work with vulnerable individuals who are recovering from homelessness.

Annika Kirk

Annika Kirk is going into her fourth year as a Business Administration student at Okanagan College specializing in accounting. She works as a Research Assistant at Okanagan College on different projects, including comparative tax policy for local industry, lived experience circles on homelessness, and social enterprise work within the alcohol industry. She feels passionately the LEC work from her own lived experience and understanding the importance of the lived experience perspective within policy and program development.

Stephanie Griffiths, Ph.D., R. Psych.

I am a College Professor in the Psychology Department of Okanagan College, based in Penticton, and an Adjunct in the School and Applied Psychology Program in the Werklund School of Education at the University of Calgary. As a clinician, I think applied research is important both at the individual and societal level. As an instructor and a researcher, I can think of few social issues more important than homelessness, mental health, and addiction. We need to do everything we can to help our communities address these issues. Fortunately, the Vancouver Foundation, Okanagan College, and our community partners provided an opportunity to explore how lived experience could help the community address these problems.

Kerry Rempel, PhD (Candidate), MBA, BPE

I am a College Professor at the Okanagan School of Business, Okanagan College based in Kelowna. I am a founding member of the Kelowna Homelessness Research Collaborative and a Board member for the Institute for Community Engaged Research at UBC-Okanagan. As a practitioner/academic, I focus my research and teaching on social change, trying to understand how organizations and systems work together to address pressing social issues. Through applied research and course projects, I bring social issues into the classroom and provide opportunities for students to explore how to make change and use their knowledge of business and organizations to create good within their communities.

Appendix B: Applying the Allyship in Research Framework

Stage/Process	How PWLLE were included	Considerations
Relationship Building	Relationship building takes time, but it formed the foundation for all our work as a research team. Without this step, we would not have had the trust to fully include all members of the team equally. • To find co-researchers willing to be part of a research project, the steering committee recommended individuals who they currently had relationships with, who might be willing to participate. • We held zoom and face-to-face calls prior to confirming the final research team. This included having specific conversations introducing each other, learning about our backgrounds, understanding our motivations for doing the work, talking about what the project could do, and establishing that we could make a working team • We discussed what each individual felt they were bringing to the overall project. • We identified how each individual's personal connections and relationships could support the research project as well.	Because neither the academic team members, the student or the lived-experience researchers had ever met or worked together, this stage was particularly important. When we did experience situations where there were misunderstandings or there were challenges in the process, it was these initial meetings that providing the context for how we resolved or approached resolution. It also helped us to understand the personal constraints each researcher faced (exams, children, tragic events, etc.) and helped us to be flexible as a team. Identifying and recognizing the personal networks of each individual in the team helped to ensure other aspects of the research project had good representation from the entire community.
Question or Design Phase	This stage can be tricky as most research projects require external funding to proceed. That can mean that some level of detail regarding the project is determined ahead of a fully formed research team. We tried to mitigate this by: • Applying for the funding with our steering committee members who had a fulsome representation of the community (including connection to PWLLE)	Once you have established ongoing relationships with co-researchers, this phase of the research becomes easier to manage as context setting conversations have happened. The conversations that framed our research process were critical to other steps in our process. Having everyone contribute to design is important as we often had to come back to these goals later

Stage/Process	How PWLLE were included	Considerations
	• Leaving the project parameters as open as possible until the full research team was in place. • Asked all research team members to identify who should be included as key participants, who would be the audience for the research once collected, etc. • All members contributed to brainstorming and reviewing the details of our approach to the research.	on in the research to ensure that we were staying within scope. Because the team was new, this was not an easy step to take. This approach to research was new to all but one member of the research team so conversations could be difficult
Background/ Context Development	While some team members took more of a role in gathering background information due to their ability to access research databases, all team members were able to access the literature directly, or a summary of the key articles. To accomplish this we needed to establish a shared repository and joint writing space. It was critical to build this infrastructure and we struggled at times with the tools we had available: • Initially we were able to use a Google Drive to ensure that everyone could have access to articles, create or read article or report summaries. This was only good until we started to collect data. • We established a space on a secure institutional server and used Microsoft Teams to continue the work of the project. Once we worked out the bugs to get everyone on the platform together, this tool became our main communication piece.	Creating the infrastructure to support a multi-site, multi-researcher team is extremely important. It was where we kept documents and wrote collectively. However, those working in traditional academic spaces may experience some of the challenges we faced when trying to get a network space that researchers from the community could access. While the institution was supportive, what we were trying to achieve had not been done within the current institutional structures. Please also be aware that individuals on your research team may need training on how to use platforms like Google Drive or Microsoft Teams. It may also be important to help them understand some document etiquette working in shared documents. No matter how experienced the group is, it's important to discuss how co-writing/working should be approached.
Planning/ Development	There were many opportunities for collaboration and shared decision making as we worked through the operational aspects of the project. • All research team members took an active role in determining how the research would be conducted,	The planning stage is an engaging stage to bring all research team members together. With respect to brining PWLLE experience into these environments, this may be the first time that they have participated in a research project. It is critical

Stage/Process	How PWLLE were included	Considerations
	the specifics of different focus group sessions, the timing and other logistics related to the work. • Each team member indicated which parts of the research they wanted to take on. All roles were open to all members. • The team made a commitment to ensure that training and practice would be available to any team member wanting to try out a role that they had little experience with. • Inclusion questions were asked at multiple points in the research process so that any individual could step up to or step down from a role at any time. This allowed all individuals to participate as they were able, how they were able.	to build in lots of time for discussion, review, training and practice. Extending this timeframe as long as you are able will ensure that research teams minimize token representation in the process. In our project we created our initial focus group plans at least 6 weeks prior to the sessions. During weekly meetings, we would work with different parts of the research plan to ensure that all participants were able to think through how the sessions would work and identify where they felt they would like to participate. We spent a great deal of time ensuring the team was comfortable with the process proposed.
Implementation	All members of the research team took an active role in conducting the research sessions. Because of our approach to plan and train early, each team member had multiple pieces that they coordinated. • Roles were chosen based on preference in most cases, but in other cases, roles were based on affiliation. For example, getting the honorariums arranged was given to a team member with a connection to the institution holding the research funds. Any team member could have taken this on, but it was easier for the academic researchers to take this on. Greeting individuals in our Lived Experience focus groups was initiated by our lived experience co-researchers as they had personal relationships with some participants. • All team members actively participating in either leading a focus group or taking notes, but all were present to hear what participants in the sessions shared.	[Note: our research methods were qualitative, for quantitative research projects, more training or different considerations may apply.] It may seem easier to have roles in the implementation determined by past experience, and in some cases, that is a good way to ensure success. However, our research team chose to challenge traditional roles of who facilitates or takes notes. This enabled us to build skills that researchers were looking to develop, but also provided a different lens on what was said in the sessions. This approach may not work for every group attempting this work as confidence and skill levels vary within all research teams. You can consider a team approach to facilitation as well which allows

<table>
<tr><th>Stage/Process</th><th>How PWLLE were included</th><th>Considerations</th></tr>
<tr><td></td><td></td><td>multiple people to facilitate or note take for different segments of research.</td></tr>
<tr><td>Analysis</td><td>Sharing the analysis process between multiple researchers is difficult. Because qualitative research of this type was new to most of the research team, time was spent creating tools to ensure that each voice was accounted for in the process.
• Initially we created a process where each team member coded the data from their own perspective and in their own way. This helped to ensure that we had a record of the initial thoughts from each of the research team members. This was all stored and tracked.
• We also employed a communal analysis approach that was visual and hands-on. This allowed all researchers to participate in the analysis process at the same time and support each other to clarify understanding.
• We used a process to identify major themes from each individual set of codes and then created a second, more sophisticated set of coded data that the team could work with.
• The research team met face to face to analyze the data. Each piece of feedback</td><td>Each research project will have different data analysis requirements. It is important to think about the analysis well before you have data. Key considerations are:
• Common, accessible, and secure storage for the data and analysis is recommended
• Keep the analysis process simple. Don't over complicate the initial stages. Sometimes paper, flipcharts and white boards are all you need.
• Find a way to make sure all perspectives are valued and heard equally. It's very easy to have a lead researcher take the data away, utilize a program for analysis which is not accessible to the entire team and have them bring it back for validation. While that works, there is great risk that the data could be misinterpreted.
• Be ready to pivot, an approach may work in one project, but not the next. Remain flexible, but committed to the analysis goals.</td></tr>
<tr><td>Evaluation of the Process and Results</td><td>Evaluation of the process and results can often be overlooked or engaged in, in cursory ways. This team engaged in period evaluation and review of results. This allowed us to:
• Question decisions made in earlier stages of the project and determine whether the outcomes matched the intention. We could pivot quickly if needed.
• Assess if the information we were collecting was answering the objective so the research project.</td><td>While it can seem to be secondary to the work being done, it is very important to pause and reflect and, as importantly, document those reflections.
• Build in time in team meetings to engage in reflective and evaluative exercises. This creates an environment where evaluation is expected and a normal part of the process. Periodically engage key stakeholders in this work as well.</td></tr>
</table>

<table>
<tr><th>Stage/Process</th><th>How PWLLE were included</th><th>Considerations</th></tr>
<tr><td></td><td></td><td>Don’t be afraid of critical feedback from stakeholders, participants, or members of the research team. Create an environment where this is expected and supported.</td></tr>
<tr><td>Dissemination</td><td>In this project we considered how we wanted to communicate out the work at the start of the project. We identified the types of reports, who would host the online versions, and made sure to budget for those opportunities.
We identified several conferences and symposiums that would be good venues to showcase this work.
We evaluated opportunities on the fly. Our budget was flexible so when costs allowed, we moved more funds into opportunities to present this work in the local community.</td><td>Imagine your knowledge mobilization (dissemination) plans at the beginning of the project. Consider how best to communicate the findings to different audiences.
Build photo/video releases into all consent processes. This allows you to be able to collect photos, videos, testimonies and other in-the-moment or reflective pieces as they come up.
Consider at which conferences, community events, etc. you would like to present the work.
Consider non-traditional knowledge mobilization opportunities such as podcasts, video clips, graphic art, etc. to communicate your results
Remain flexible, opportunities will arise during the course of the project which could not be envisioned at the start. If allowed by your funder (have a conversation with the funders), be prepared to change directions as better opportunities come up.
Ensure all members of the research team have the opportunity to present the project as they feel comfortable to do so, and budget funds to support them.</td></tr>
</table>

Appendix C: Data Analysis – Community Focus Groups

Initial Coding, Individual notes

Document Purpose

The first step in our data analysis is to have each individual co-researcher go through the notes from the session to identify the most important "themes" from each topic. This document captures our individual thinking, separate from what we will do as a group.

This approach allows us to see how different researchers see the data that was collected, and all voices can be captured in our process. We use this approach to make sure that no voices in the analysis are drowned out by other voices at this very early stage.

We keep these documents as a record of our analysis and they provide us ways to go back and double check that we haven't missed any key pieces later on. These documents will form the basis for our next level of analysis.

Theming the Data

There are a few things that we should keep in mind as we approach data analysis:

- We work with the data as it was recorded (this could be our personal notes as well as the document created in the session)
- We try to keep our individual "voices" out of the analysis (we want to stay true to what was discussed without adding items that we 'think' they meant, or 'think' should be added)

Working with the kinds of data that we collect during focus groups can be challenging. Our key focus will always be to make sure we are representing the view of the participants, not our own. This can be tough! Sometimes it helps to keep separate notes with your own thinking, separate from this document (or you could add your own thoughts at the end under the "NOTES" section.

How do I "Theme"?

There are lots of technical ways to approach this, but for the purposes of this project and this stage, the following are some guidelines to use:

1. Read through the whole set of topic notes FIRST before you start to think about themes. This keeps us from jumping to conclusions about how to cluster the information
2. There is NO RIGHT answer to what the themes are. Generally, we are trying to identify 'categories' or 'themes' that the feedback fits into
    a. There will always be some items that don't fit into a theme… and that' OK. For those items, just put them into a placeholder. Sometimes we might call that "???" or "Un-themed".

Approaches that you can try:

1. Start with the categories/themes that jump out at you. Often times there are very clear clusters that are obvious to you. Name the categories or themes in a way that makes sense to you. At this first stage, it's more important to find like items and pull them together.

2. Keep track of which items go with each category or theme. If this works for you, you can use the tables in this document to copy and past data items into different rows. Each row would be a different category/theme. *It is possible that one item from the data would fit into more than one category*.
    a. If you are working on paper, you can do the same by putting a number or letter beside each item from the data. That way all "A's" go to the same category, all "B's" go to the same category. It's each to see which data/line items don't have a home category when we use this approach.
3. If a piece of the data doesn't fit… that's OKAY. Just park it in that "un-themed" category

Simple vs Complex Theming

Simple

The simplest and the easiest way to start the data analysis is to follow the steps outlined above. Create category homes for each cluster of ideas in the data. It's enough to bring this to our first analysis meeting

Complex

If you want, you can now look at all of the categories/themes and see if any of them can be connected together in bigger themes. This is really a second stage of our analysis and we'll do this together as a group as well. It can help your thinking sometimes and you may find yourself seeing patterns that you want to note for future discussion.

Collecting Research Notes/Reflections

Finally, it's important to make sure you take a moment at the end of this first stage of analysis to make notes about what you learned, things your discovered, or items that you want to remember for later. These notes don't necessarily have to lead to anything later in the data, but it's a good practice to do this reflection so that you can remember what you were thinking during the process.

There is a place at the end of this document for you to put your reflections.

Data Theme Table – Community Focus Group

The following Tables are designed to help you capture your ideas around the themes from our community session on November 25. There are three components to the table:

- Theme Title – give the theme or category a title that captures the heart of the cluster of ideas from the focus group
- Supporting Data Points – here you can copy and paste the pieces of data that you feel fit in this category/theme
- Notes – this is simply here in case you need to note something specific. You may not find it necessary to use this column.

Topic #1: Need for Lived Experience Group

Topic Prompts

- If there were a Lived Experience Group created to support the community of Penticton, how could this group help address homelessness?
- What are some specific examples where this group could play a role?

Theme Title	Supporting Data Points	Notes

Topic #2: Expectations for a Lived Experience Group

Topic Prompts

- What expectations would you have for this kind of a Lived Experience Group?
- How would the community access the group?
- When would the community access the group?
- How would you know if the group was successful?

Theme Title	Supporting Data Points	Notes

Topic #3: Sustaining a Lived Experience Group

Topic Prompts
- What would be needed to sustain a Lived Experience Group?
- Structure?
- Funding?
- Supports?
- Governance?

Theme Title	Supporting Data Points	Notes

Researcher Notes

You may want to keep some additional notes here that you want to remember for later, or that might be useful later on in the research process.