Section 2: Convening

One of the most important steps in developing your Veteran Engagement model is deciding who are the right people to invite as consultants and collaborators. Across VA, there are a range of different types of people that have been identified as appropriate for stakeholder groups, including Veterans, care partners, or community-based or VA-based providers. The question of who to invite should be informed by your mission and the focus areas of your Center. Once you decide who to recruit, the next question is how to recruit these individuals. In this section of the Toolkit we provide some ideas that other VA Centers have successfully used to outreach to and recruit Veteran stakeholders to participate in their Veteran Engagement initiative(s). When possible, we have provided example recruitment materials from VA Centers that may help inform the development of your own recruitment efforts (see **Resources section**).

Recruitment	Training	Initial Meetings	Reflection on Process

2.1   Recruitment

Recruitment is one of the most common topics of interest when it comes to establishing an Engagement Group. It can be helpful to think about what characteristics would be ideal for your Engagement Group and try to target recruitment as best you can to fit that vision. Diversity takes many forms in the Veteran community. There may be traits specific to the military that need consideration, such as branch of service and rank. Just as you may seek to have men and women involved, you may also decide to consider the representation of rank in your group.

Defining the type of initiative you want will help dictate what actions you pursue for your recruitment. There are different ways an Engagement Group can be set up, from a group that has open meetings for all to attend, to having a structured meeting where the same members regularly attend. Either method will provide opportunities for Veterans to engage with researchers. These opportunities are the critical piece, and there are lots of ways to get there.

It may also be helpful to think about your Engagement Group development in stages, breaking the task down into pieces. Some locations decided to start small, with 2-3 Veterans, and grow from there. In Portland, CIVIC implemented a 'seed committee' to get rapid feedback as the center developed a plan and a process for its Engagement Group, and then the seed committee members helped with outreach and recruitment from the local community.

2.1.2   Who to recruit

You likely started working on recruitment in the planning phase. Who you want to engage depends to a large extent on you mission and purpose. Some commonly considered characteristics that drive recruitment include:
- Era of service (e.g., WWII, Korean, Vietnam, Gulf War, OEI/OIF, in-between war periods)
- Branch of service (e.g., Army, Navy, Air Force, Marines, Coast Guard, National Guard)
- Service Rank (e.g., Private, Field or Senior Officers, General, Lieutenant General, Captain
- Gender
- Type of stakeholder other than Veteran (e.g., family members, VA employees, Veteran liaisons, etc.)
- VHA utilization (Veterans enrolled or not enrolled in VHA care)
- Ethnicity
- Education and Professional Backgrounds

2.1.3   Develop a recruitment plan

Develop a recruitment plan that outlines who, what, where and when you will conduct your outreach efforts. Some VA Veteran Engagement leaders have told us that having a recruitment plan demonstrates to those you are recruiting that you are thoughtful and serious about their engagement. Your plan should include the following information:

Who to recruit is discussed above. While you may need some flexibility in your recruitment, it is helpful to have a sense of the diversity of participants you would like to have from the beginning.

How and Where to recruit can take many forms. Many samples are provided through the links in **Section 6 – Recruitment Materials.** Some suggestions are listed below:

Flyers and Posters: Most sites have developed recruitment materials ranging from flyers to tri-fold brochures. These are useful to provide to individuals as you meet them in person or to leave in designated areas for people to review if interested. Consider putting flyers in locations that are not Veteran specific like hardware stores (Home Depot, Lowes), grocery stores, etc. Hard to reach groups of Veterans (non-VA users, minority groups, rural Veterans) may not attend well-established Veteran groups or specific Veteran spaces (VA), so being creative in reach is important.

Presentations: considering presenting the idea to local groups within and outside of the hospital (e.g., Research Week Presentation, MyVA groups or Mental Health Councils, VFW, American Legion, etc.). Using the internet and social media to search nearby Veteran organizations or other groups that may attract Veterans (outdoor adventure, activist, arts, disaster relief, etc.) may increase reach. Often, involved Veterans take part in well-known Veteran organizations. Some internet or social media sites will contain contact information for the group. The best way of outreaching groups is to be persistent and try multiple approaches including physically going to a meeting or activity. An increase of virtual conferences and meetings has opened up opportunities to present to different communities.

Recruitment Letters for Providers: Connect with Providers and Services in the hospital. Provide them a detailed description on what your center is doing and ask them to pass on your contact information to Veterans who may be looking for these types of opportunities.

Word of mouth: The best word of mouth is from Veterans you are already engaging with. Consider options for engaging Veterans in the recruitment process (i.e. paying as a consultant, snowball recruitment, etc.) Try contacting county or state veteran service officers, discussing your Veteran Engagement activities and VA research, and ask them to share information within their networks to establish trust. Veteran service officers may also post and share materials in local stores, newspapers and veteran service organizations. Reassurance that you are not recruiting for research participants for surveys may be necessary.

Social media: If you are looking for a large number of people to take part in an Engagement Group or you do not have specific recruitment criteria, you may consider posting information about the opportunity on approved social media sites, such as Facebook and Twitter.
Consider creating an eye-catching recruitment post that contains: Objective/Ask, Time, Contact Information (see Section 6 "Recruitment_Facebook post" example). You will need to obtain approval from your VAMC's Public Affairs Officer or social media point-of-contact prior to posting. There are free online tools for designing Facebook posts (see: pixlr.com, canva.com). After the Twitter or FB post goes live, share it with your contacts. Consider sharing with Veteran groups in your area directly via Facebook Messenger.

Point of contact is important to designate so that individuals interested in learning more about the engagement opportunity have a clear sense of who they can contact.

Process for selection is a good practice to ensure those interested understand the commitment and will be a good fit for this type of activity. Some Research Centers have Veterans fill out a Statement of Interest, interview with staff and other Veterans, or both. Additional recommendations for setting up a process to select Engagement Board members are provided below.

Training that may be important to prepare Engagement Board members for their role is also important to include in your recruitment plan. This allows you to be able to explain what the orientation and preparation process is when you identify potential members. It also helps prioritize the development or adaptation of training materials.

CASE STUDY

For the formation of the Rural Colorado Veteran Engagement Board, the team used multiple strategies for recruiting. They started within the VA by contacting providers, research center leadership, and already established Veteran engagement boards to share the one-page flyer containing information (see section 6 for "Rural CO Virtual VEG Recruitment Flyer". Next, they contacted Veteran Organizations in Colorado using an internet search. Through the internet search they found a network of county veteran service officers (VSOs) on Colorado state's department of veteran affairs website. Using criteria from the Office of Rural Health, the project coordinator sent an introductory email (see section 6 for "Intro email" example) to each of the county's VSOs that were in Eastern Colorado catchment area and considered to be rural. If no response was received to the introductory email, they sent another email about 2 weeks later. If there was no response to the 2nd email, then the coordinator called the VSO number that was listed on the website. Phone calls seemed to be received the best. Often VSOs would offer to post a flyer in their office and sometimes in highly frequented community locations like grocery stores. They also communicated the engagement opportunity at local American Legion or VFW meetings and shared with their network of Veterans. Other Veteran Organizations, such as the American Legion or Veterans Coalitions, requested for the team to make virtual presentations at meetings.

CASE STUDY

Transitioning to virtual recruitment: We had originally planned to travel to Veteran Service Organizations located in Iowa counties within the Iowa City VA catchment area to hold presentations about an ORH-funded study and their plan to stand up a Veteran engagement group. Due to COVID-19, we switched to virtual recruitment. We used a multi-pronged approach including: one-on-one Veteran Service Officer (VSO) engagement, social media posts, and word of mouth. The VA Public Affairs Officer proved an excellent resource for recruitment, as they have experience with media contacts and strategies. We determined newspaper ads too expensive; however for future recruitment we may consider sending press releases to local papers. Most effort went into recruiting VSOs to act as "spokespersons" for the project, relying on them to recruit Veterans they thought may be interested in joining. We found that multiple contact with VSOs aided relationship building and the likelihood that they would pass the information on to Veterans in their area. However, this approach limits reach to Veterans who were more likely already connected to the VA system, and more specifically, likely had a positive connection to the VSO. We posted a Facebook "ad" on the Iowa City VA Facebook page which could be shared. We found that Facebook was a good way to search for county-level Veteran service organizations outside of American Legion, VFW, or DAV. In addition to posting on the main page, we shared the post via Messenger with these organizations. Active recruitment began in late October 2020, and the first meeting was held via Google Meets on December 9, 2020.

Additional thoughts for your recruitment plan:

You may find some initial confusion about whether or not this opportunity is a research study. Keep in mind that Engagement Groups for research are still relatively new and may take some explaining – to BOTH Veterans and researchers. Two recommendations include: 1) make sure the people who are recruiting individuals to take part in groups are able to explain what is being asked of them, and 2) be as transparent as possible about what will be involved and how their input will be used. This will help ensure that those who connect with you will have expectations consistent with the work they will be doing.

2.1.4   Selection Process

Applications and Interviews*:* As noted above, a number of Research Centers have a formalized process for selecting individuals to be a part of their Engagement Groups. Some have a two-step process that begins with submission of a statement of interest to participate and/or completion of a brief application. The second step is an interview. The statement of interest or brief application provides you with some initial information about why an individual is interested in research. Some consideration is needed on how interested participants may return statement of interest or application forms. Some Veterans may have limited software available on their computers or may only

have a mobile device. To overcome these barriers, consider having questions in an email format that can be easily replied to or offer to collect answers by phone. Sometimes due to staffing, room, or other restraints we are not able to offer everyone an opportunity to participate in the Engagement Group. Some Research Centers have created a rubric to score the interviews or interest forms, which can help make the selection process less subjective (see Recruitment Materials in Resources Section). The necessity of a formal application process should be informed by the purpose or focus of the Veteran Engagement group.

An interview is recommended regardless of formality of the application process. We recommend striving for a conversational tone. Having questions identified in advance can be helpful and ensure consistency. Interviews are also an opportunity for prospective Veterans to ask questions and get clarification about what is expected. Approaching this as a two-way exchange is helpful to everyone involved.

Interviews can be conducted in person, by phone, or by a video conferencing platform (Zoom, Teams, etc.). It's important to keep in mind that interviews do not have to be the same as ones you may conduct for a study.

People conducting interviews should be prepared to provide prospective members with the following information:
- Objectives of the group
- Information on the Research Center
- A summary of the position (role of Veterans on Engagement Groups)
- Examples of duties and responsibilities
- Overview of any training requirements
- Compensation information
- Professional characteristics (e.g., listens well, shares perspective, etc.) you would like someone to have

During these initial conversations you may also spend some time discussing the research process. Research can be a meticulous process and it is important to discuss the role of Engagement Groups in the process and timelines for giving and receiving input on research. It is often a bit of a surprise to people outside of research how long it takes just to get a study developed and funded! Again, these types of practices can also show how important and valuable the Veterans engagement is to the Research Center.

> ## CASE STUDY
>
> When Portland was establishing the CIVIC Veteran Engagement Group, people interested in joining or referred, were asked to share a bit about themselves and write a paragraph about why they were interest in collaborating with researchers. There were also demographic questions and a free text question about health conditions of personal interest (no requirement to disclose PHI). It was a way for us to get a sense of people before a conversation and one investigator pointed out that we'd know someone was a good fit when they turned in a paragraph and returned our calls.

2.2   Training

Training is an important way to set people up for success. Like most aspects of Veteran Engagement there are numerous paths to take and one is not necessarily better than another. If there is a best practice related to training, it is to keep in mind that you want participants to succeed – to feel confident and comfortable, and to take away something positive from the engagement encounter. This applies to Veterans and stakeholders as well as researchers. Training is important for Veterans so that they have a context for research and feel comfortable talking with researchers and sharing their experiences and perspectives. Training for Veterans also needs to inform them of important principles in research such as privacy and data security. Training for researchers is also important to offer. Researchers may not be comfortable with the idea of getting feedback or may have questions about what to do with feedback – especially if it is critical. Training or support may also be needed to make sure that information is delivered at a level that is understandable and accessible. Understanding the intent of an Engagement Group helps a presenter prepare for an encounter.

During the Planning phase of your Engagement Group you may have started thinking about the kinds of training that may be useful to offer to Veterans and research members. When you convene your Engagement Group and meet in person, take the time to discuss their training interests and needs. Use this meeting time to assess what is essential for Veteran members to thrive in the engagement process generally or on specific projects. Every Engagement Group is different. Many who have active Engagement Groups have built skills over time to anticipate and address the training needs of Veterans and research staff.

Ideas for training topics include:
- What is Health Services Research? *(for Veterans)*
- Health Services Research & Development (HSR&D) Research at the VA: An overview of policy, grants, programs and timelines *(for Veterans)*
- Military cultural competence *(for Researchers)*
- How to communicate scientific concepts in lay language, shared decision-making, and basic knowledge of military organization and history *(for Researchers)*

Training does not all have to happen at once. Training can be an ongoing group activity. When you run into an area that you don't know about, invite an expert in to provide a training! If time with the Veterans is limited, consider creating a one-page resource sheet on the topic (see Section 6 for "Informed Consent Factsheet"). This Toolkit can

be used as part of training and there are materials in the **Section 6 –Training** that offer training activities and models to help visualize engagement.

Below we outline examples from the Durham COIN VetREP and the Portland COIN Veteran Engagement Group (VEG). These VE training narratives demonstrate multiple strategies for shared decision-making that have been successful within VA HSR&D.

CASE STUDY:
Two approaches to training

The Durham COIN VetREP (est. in 2016) convened a planning committee (which included two Seed Committee members) to develop and adapt trainings for Engagement Board members. They worked together to adapt three training modules:
Module 1: Research: What, Why and Who
Module 2: Research Ethics: History and Application
Module 3: Understanding the Research Process

VetREP members spent the first six months training with the Center Veteran Engagement lead, Dr. Jennifer Gierisch and the Liaison, Brandolyn White, MPH. The 3 modules provide the foundation to enable the VetREP members to engage with various research studies.

The Durham VetREP annually recruits new members. The VetREP leadership team facilitates the annual training models for inaugural and new members.

The Portland CIVIC VEG (est. in 2015) convened a Seed Committee as part of a plan to implement the CIVIC Veteran Engagement Group (VEG). This group consisted of 4 Veterans, each bringing a different connection to the local Veteran community and 4 researchers. The Seed Committee met 3 times over the course of 5 months.

Two types of training were identified as being important for Veteran members. First, in order to be compensated for their time, Portland COIN VEG members were required to go through the WOC process. As part of this process they were required to complete TMS trainings associated with research and privacy. These could be completed online when it was convenient.

The second kind of training focused on health services research and clinical science. The Seed Committee opted for these trainings to be provided through facilitated conversations with Center VEG leads and through research presentations made by Investigators.

Today, Portland CIVIC VEG is comprised of 8 members who have been relatively consistent since its inception.

2.2.1 Distributing Technology

Tablets bought specifically for research: If there is money available, consider purchasing tablets specifically for Veteran Engagement activities. Tablets will need to have the ability to open Microsoft Office documents (Word, PowerPoint) and PDFs. See Section 6 for example supporting documents to be used in the distribution of tablets.

CASE STUDY:

Eastern Colorado GRECC's method of purchasing and preparing tablets for checkout

Each year in the VISN MOU funds are requested for Veteran Engagement member stipends. Additionally, through this same process, funds have been requested to purchase tablets, headsets, and other assistive technology needed to support Veteran Engagement such as assistive listening devices. Tablets were purchased through VA's Equipment Request Strategic Equipment Planning Guide (SEPG). The equipment was then delivered to the VA main purchasing department where it was tagged with a VA equipment label before being sent to the department/person that purchased the equipment. Once tablets were received and tagged, we worked with the Bioengineering Department to download both Adobe Acrobat Reader and Microsoft Office onto the tablets.

2.3 Initial Meetings

In **Section 3: Working Together**, we provide an overview of key ingredients for successful meetings with your Engagement Group. In this section we highlight strategies that are important for those first initial meetings with the group. The goal of these initial meetings is to cultivate a sense of enthusiasm and value of the group and to lay the foundation for a strong working relationship between Engagement Board members and you or your Center and between Engagement Board members themselves. It can be tricky to strike a balance between relationship building and getting through logistical, bureaucratic and/or training requirements. We strongly recommend you prioritize what is most important to set the right foundation.

TIPS:
Two ways to prepare for meetings

After the three module trainings with the **Durham COIN VetREP**, the VE Liaison sends *"Research Questions for VetREP Investigators,* which is filled out in advance of the VetREP meeting. This document provides a foundation to guide the research engagement discussion and meeting materials. It gives individual Investigators the flexibility to engage with Veterans using shared language and to communicate up front what Veterans need.

When the **Portland VEG** liaison prepared for monthly meetings, she asked the Investigators and teams to identify 2-3 key questions that they wanted the VEG to address. This guided feedback and informed the pacing of the meeting to ensure there was time to touch on questions identified. The VEG liaison regularly consulted with research teams about tips for talking to the VEG, (e.g., make eye contact with the group and use accessible language).

Sample meeting:

Pre-Meeting Activities

As people begin to gather, it is important to acknowledge everyone in the room and on the phone. Meetings will often start 5-10 minutes late because of the nature of coordinating a group of people that travel to meetings. VA parking is a notorious challenge at many facilities. Allow for flexibility in the beginning of the meeting and remind folks about the location of rest rooms and availability of snacks and coffee. The use of affirming language for Veterans and staff can build comradery in the engagement process. This acknowledgement of appreciation for the Veterans' time and attention to detail can build inclusion and group morale. Use preferred names when members enter the room; this will give other people cues that the Engagement Group has a sense of community. Remember to laugh, make eye contact, speak clearly and recognize accomplishments or life changes when appropriate (e.g., a sick relative, a new baby, recent vacation). The first informal ten minutes of a meeting can set the stage for success.

Introductions: Go around and have everyone introduce themselves. It can give you a lot of information, especially what people choose to offer about themselves and which aspects of their identity the foreground. You may also ask individuals to talk about why they were interested in joining the Engagement Group and what they hope to gain from their participation. This creates a shared sense of understanding and mutual reinforcement of goals.

Agenda: This will vary depending on the stage of implementation of your group. In all meetings it is helpful to provide an overview of the meeting agenda and make sure everyone has reference materials when needed. Templates are available in **Section 6.5-Templates for Abstracts, Agendas, and Notes/Minutes**. Information to provide during the initial meeting also includes:

- *(initial meeting)* **How do we work together**: Introduce the Mission Statement or Charter (this is COIN- or project-specific)
- *(initial meeting)* **Frequency of meetings**: use this initial meeting to ask how often the Veteran members want to meet, establish a goal and provide a follow-up email with meeting schedule.
- *(first few meetings and periodically as needed)* **Provide overview of roles, responsibilities, expectations** – reminder of group ground rules

Trainings: Some Research Centers opt to spend the first few meetings making sure that Engagement Board members feel prepared for their role. You can use some or all of your meeting time to provide recommended trainings. While this can provide a quick way of getting through the training recommendations, the potential downside is that members may start off with the impression that their role is to listen and learn rather than provide input. Another option is to provide a mix of training and research presentation/discussion during the initial meetings so that members gain a more immediate sense of what they have signed up for (See **Section 6.4 – Trainings for Veterans**).

Research presentation / discussion: Over time, most of your agenda will focus on providing input on research studies. Even though there is a lot to cover in the initial and first few meetings, it is nice to have at least one researcher present or share their work. We often learn best by doing, so jump in.

Expectations about next steps: With about 10 minutes left, be sure to remind the group when the next meeting is and make sure you know the best mode to communicate with members. In most cases email works well. If you are incorporating reflection or feedback surveys or activities into your process, make sure you save adequate time to get to these activities.

Compensation for participation: This should be established during *planning* (see **Section 1.8**). The Veteran Engagement liaison should pass out or mail compensation at the end of the meeting. If there is a delay in payment, make sure that follow through is timely.

2.4   Reflecting on Process

It is important to remember that establishing an Engagement Group is not an easy task, but once established it becomes rewarding quickly. We have heard from researchers that the encounter with an Engagement Group is often "surprising" or "not what I expected". People are frequently surprised by how energizing the encounter can be. One colleague said that it was nice to have Veterans validate her work as relevant to them and to have a group be excited about a study. In the early months of meetings soak up what might seem like small wins. If people come to a second meeting that is a big win.

After you make it through recruitment, training and preparing processes, it is disappointing to have someone drop off before the group really gets going - but it happens. This is not necessarily a direct response to what you are doing – do not get discouraged. At one site, for example, a woman Veteran was recruited and in the phone interviews she was really excited about the opportunity. She had a natural curiosity and seemed like a great fit. When she didn't come to the first meeting (even after confirming the day before) the group liaison was concerned. Following the meeting, the liaison got a voicemail from the woman saying that she drove all the way to the VA, but when she got there she couldn't get out of the car. She just could not bring herself to walk into the hospital, so she sat in her car for a while and then she left for home. There are times when you find the right person and it just isn't the right time for them to join. If possible, keep the door open so that if their situation changes in a year or some time down the road, there is an option to join the group later.

As a group, the SERVE team debated where to put *EVALUATION* in the Toolkit. It is a stand-alone section that can be reviewed at any stage – see **Section 5 of this Toolkit**. Some groups expressed that getting a group implemented was tough enough and that thinking about collecting measurement data was too overwhelming. Others didn't think about data at this Convening stage and later wished they'd collected baseline data. It is up to you if and when you are able to tackle measurement.

In the meantime, there is one more thing to do once you have successfully convened your first Engagement Group meeting: take some time and reflect on the process.
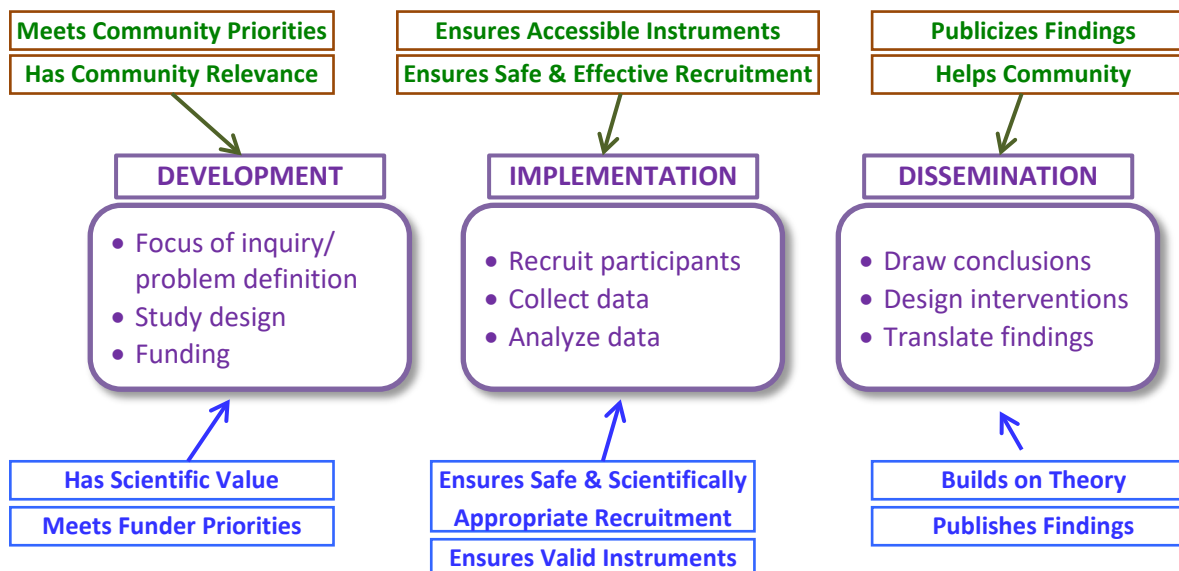
- What surprised you?
- How engaged were all participants in the discussion?
- What might you want to do differently or try next time the group meets?
- Did anyone eat the snacks – which ones?

Early Engagement: Understanding Personal Drivers

There is also reflection that can help you stay in alignment with your engagement goals and make adjustments when needed. The model below may be helpful for thinking about why participants come to engagement encounters.

Veterans

KEEPS RESEARCH ETHICALLY SOUND AND SOCIALLY RELEVANT

| Meets Community Priorities | Ensures Accessible Instruments | Publicizes Findings |
| Has Community Relevance | Ensures Safe & Effective Recruitment | Helps Community |

DEVELOPMENT
- Focus of inquiry/ problem definition
- Study design
- Funding

IMPLEMENTATION
- Recruit participants
- Collect data
- Analyze data

DISSEMINATION
- Draw conclusions
- Design interventions
- Translate findings

| Has Scientific Value | Ensures Safe & Scientifically Appropriate Recruitment | Builds on Theory |
| Meets Funder Priorities | Ensures Valid Instruments | Publishes Findings |

KEEPS RESEARCH SCIENTIFICALLY SOUND AND ACADEMICALLY RELEVANT

Researchers

Adapted from Dora Raymaker, Katherine McDonald, Christina Nicolaidis, 2009. Contact dora@aaspireproject.or

The model is designed with **Community Based Participatory Research** in mind, but it also applies to Veteran engagement. It is a nice reminder that different participants in Engagement Groups can have similar and different goals that keep them engaged. Maintaining an open line of dialogue with an Engagement Group and the local researcher community will help surface challenges before they become problems. Keeping these different reasons or motivators in mind will help you build bridges when needed and ultimately cultivate a strong and resilient group.

2.5 Common Barriers to Engagement

Once you have identified your method for engagement, your next step is to start identifying major barriers that prevent Veterans from being able to engage. Issues that might hinder participation or make participating more challenging for a particular Veteran can be explored during the initial member selection interview. Here are some examples of some barriers that we have encountered and the solutions that we have used.

Distance to meeting
This can be a barrier particularly for older Veterans or for rural Veterans. Consider the opportunity to have a virtual option for in-person meetings whether that is by phone or a video conferencing platform such as Zoom.

Schedule of the meetings
Timing of the meetings and frequency may include or exclude certain groups of Veterans. Daytime meetings may create barriers to participation for Veterans who work fulltime or go to school. Evening meetings may exclude Veterans with families or who work night shift. Asking about availability during recruitment can be helpful. Ultimately being flexible in scheduling meeting times around the boards' needs versus yours is crucial. Also having consistent times for meetings can help with scheduling multiple members (i.e., 1st Wednesday of the month).

Access to Internet
If no access to Internet, discuss options with the Veteran about willingness to go to a public place with free WiFi like a library or specific businesses. Provide headphones so that the Veteran can hear the meeting, and all members can have more privacy (protects the confidentiality of group members).

Ability to access materials to prepare for and reference during meetings
With any of the different methods of engagement (virtual, in-person, or hybrid), consider if all Veterans have the appropriate technology to receive and review documents ahead of the meeting, as well as documents and presentations shared during a meeting. For example, if they only have a smartphone then they may have access to WiFi/internet, but it may be too small for reading slides or seeing presentations. Consider your ability to provide a

tablet or to send all meeting materials before the meeting in hardcopy form. Some Veterans may prefer hard copies and not want to print many pages of material. Ask Veterans their preference before the meeting. We have provided both hardcopies and a digital copy to members that requested paper copies, in case they get lost in the mail and another copy can't be sent before the meeting.

Unfamiliarity with virtual platforms]
Some Veterans may not be familiar with how to use technology. We have scheduled times to sit down and walk them through the use of technology (tablet, Zoom, etc.). After those sessions we then provide a paper copy of instructions on the tasks that we showed them so that they can reference them later. Also, setup as many shortcuts as possible, such as facial recognition instead of a password or setting up shortcuts to Zoom/MS Teams on the home screen, as well as a folder structure for each month of meetings, can assist Veterans so that they can easily get to folders or sites.