

# STRUCTURED INTERVIEW MATRIX (SIM) Facilitators' Guide



# **STRUCTURED INTERVIEW MATRIX (SIM): Facilitators' Guide**

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The Structured Interview Matrix (SIM) is a participative facilitation method originally introduced by Bob Chartier (2002) that can be used for research, consultations and strategic planning; it can also be used as an innovative teaching tool or intervention. Hosting a SIM requires careful planning, therefore the purpose of this facilitator guide is to help teams using this method with planning the logistical aspects of hosting a SIM, through to managing the information (data) when the session is complete. After many requests over the years for instructions on how to run a SIM, we wrote this guide with a broad audience in mind; it is intended to be a starting point for hosting a SIM consultation. For teams who plan to use this method for research purposes, we will provide a separate guide on how to manage the large amount of qualitative data generated during a SIM session, and some suggestions of how to approach analysis.

In this chapter, we focus on in-person SIM sessions, however given the widespread use of virtual meeting platforms since 2020, we modified this protocol for an online format. The adaptations we use for virtual SIM sessions are discussed at the end of this guide, complete with tools for facilitators.

This guide is structured according to the steps required for planning a SIM session. Before we jump into a discussion about selecting a facility, considerations for planning logistics ahead of the session, and a list of supplies, we thought it would be beneficial to provide a quick overview of the SIM protocol so it is easier to understand why we put so much emphasis on the space and set-up. These tips come from our combined experience hosting 50+ SIM sessions over the past 18 years, with different topics, a wide assortment of organizations and participants, small and large group sizes, and various types of facilities. After our explanation of how to select a facility and set up the room, we return to a detailed section on the protocol for facilitating a SIM session and suggestions for managing the information collected.

## **Overview of SIM Format**

In our experience, a half-day SIM session takes about 4 hours from start to finish. This includes registration, welcoming participants, introducing the session, roundtable of introductions, the SIM protocol, and wrap up.

The SIM format can accommodate up to 40 participants. Once we have an idea of who will attend the session, we divide the list of participants into four evenly distributed groups (ideally at least 3 participants per group). To structure the session and focus the discussion, each group is assigned a question —and asked to gather information to answer that question during the session.

The SIM protocol has 3 distinct steps (see Figure 1), each about 45 minutes in duration: 1) One-to-one interviews among participants, 2) small group deliberation to synthesize findings from the interviews, and 3) a large group facilitated discussion about the findings.



Figure 1. Overview of the Structured Interview Matrix Protocol

The first step of the SIM is where participants do one-on-one interviews paired with participants from the other groups. Each participant takes notes while interviewing the other participants so they can accurately document the responses to their assigned question. The interviews are structured by the facilitator who keeps time and provides guidance of how/when to switch pairs. The second step is where everyone returns to their table to discuss the notes they collected from the interviews; each small group works together to synthesize the findings into 3 main points. For the final step, each small group selects a representative to present their synthesis to the larger group, and the facilitator guides a discussion with all the participants.

With these steps in mind, it is easier to understand the decision making in preparing for the SIM session, such as selecting a facility, setting up the room, planning to host participants, and preparing for the SIM facilitation. Planning is essential – and can make the difference between a smooth SIM session or confusion with the different transitions.

## Selecting a Facility

**Parking ...** To host a comfortable SIM session, it is worthwhile spending time exploring different facilities available to your group. Before considering the characteristics of the room, we recommend finding out whether there is access to public transportation near the facility, the number of parking spaces available, and whether there are additional costs associated with parking. It is important to base the decision of which facility to use upon who is attending and

their access to transportation —as well as the available budget. Parking costs can add up quickly, depending on the number of participants.

A facility which has ample free parking is preferable —for convenience of course— but also to ensure participants can find parking with ease, so they are not delayed arriving at the session. In our experience, there are always some participants who arrive just in time for the session to start, so it is important that they be able join the group quickly without the additional stress of limited parking.

From an administrative perspective, free parking is ideal. It eliminates the need to reimburse people, collect receipts, and/or give out passes. However, if free parking is not available, it is important to consider the logistics of how parking passes or reimbursements will be managed. It may be possible when renting the facility to pay for a group of passes in advance and issue them to the participants before they arrive at the session.

If parking passes must be paid individually, details can be provided in the participant information package, including instructions for how to submit their receipts for reimbursement. For some of our SIM sessions we send participants a PDF of a parking pass by email in advance so they can print it before arriving at the facility; this eliminates the need for them to come into the building to get the pass and return to their car to put it in the window.

**Space ...** Moving inside the facility, the next decision is the size and layout of the space for the SIM session. The room should be big enough to accommodate 30-50 people, 7 large tables, a chair for each person, and 7-8 additional chairs. In general, we plan for a session with 40 people so we have the flexibility if registration for the session is high. The suggestions for room set-up here work for a SIM session with 12 people or 40 people – the number of chairs can be adjusted if the session is smaller.

**Set-up ...**Setting up the room in a functional way is essential for the SIM. By functional, we are referring to movement within the room, space for conversations and networking, and managing logistics for registration and refreshments. As a general set-up, we typically place one long table and a few chairs at the entrance to the room to manage registration, another long table for refreshments at the edge of the room, and a smaller table and chair at the front of the room for the facilitator to use while leading the discussion. If serving a meal for the SIM participants, it is important to consider the space around the long table where people will be accessing the food; for a buffet table we make sure we position the table so there is space for a line up, and participants usually bring their food back to their table.

The other four tables are where the participants sit during the SIM (see Figure 2 below). We typically use 4 large round tables; if round tables are not available, 2 rectangular ones can be

placed together to make a square table for each group. In total there needs to be space for 4 tables with 3-10 people seated together.

During a half-day SIM session there will be at least 45 minutes where the participants are interviewing each other. During this time, half the people in the room will be talking at the same time. When selecting a room for the session, we recommend organizers ensure there is space between and around all the tables, to enable participants to distance themselves if needed and to accommodate lively conversation in the session.

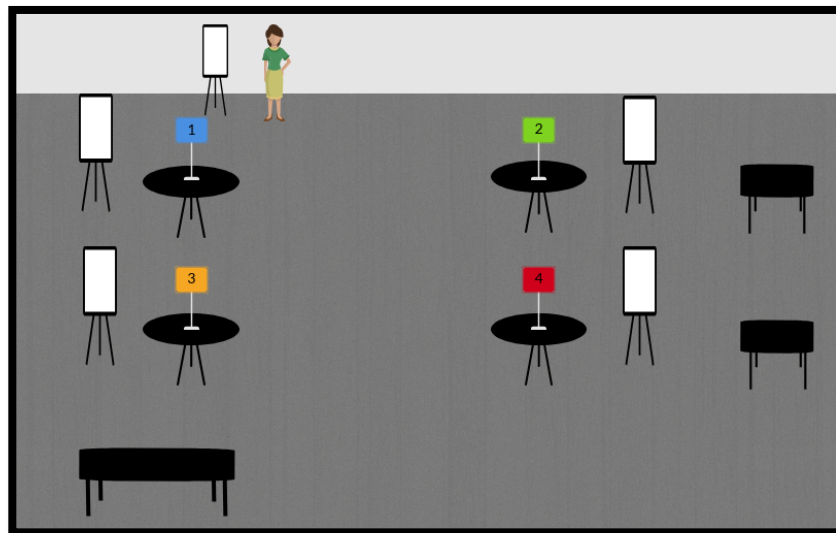


Figure 2. Sample room set-up

**Accessibility** ... When selecting a facility, we recommend organizers consider accessibility options for people with disabilities. In particular, we look for rooms where there is an accessible washroom nearby. Having the washroom close to the SIM room means participants can slip out quickly when they need to and not miss much of the discussion. The spacing between tables and chairs is also important to consider for those with mobility issues, or for people using wheelchairs.

In Step 1 of the SIM session, which is the interview matrix described in detail below, there will be many people talking at once. For people who have sensory disabilities (eg. people who use hearing aids) the noise in the room may make it difficult for them to hear during the interviews. Having a separate space beside the main room —or a few chairs out the hall— will ensure participants can select a space where they can hear the questions while being interviewed and the responses when they are the interviewer. In our SIM sessions, if needed, we provide notetakers to support people with disabilities. This can be helpful for participants who have visual limitations or difficulty writing. Sign interpreters can also ensure people who use sign language can participate fully.

*Colour Coding ...* In organizing the space for the SIM session, we use both numbers and colours to identify the different tables and groups; we do this because some people remember numbers easily, whereas other people relate more to colours. During the session people are moving around the room. To keep things moving smoothly, it is helpful to have quick ways to identify participants from the different tables. Name tags are useful for this process.

For our SIM sessions, we put coloured dots on the participant name tags to help them identify who is with each table. This is helpful when participants are transitioning between interviews in the first step of the SIM. For example, when they are instructed to pair up with someone from the Table 4 (which is the red table), they can look for the dot on the name tags to identify someone from that table to interview— we will discuss why this matters in the protocol section below.

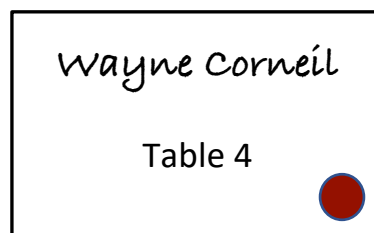


Figure 3. Sample colour coded name tag

*Office Supplies ...* We have a list of office supplies we use to help the SIM sessions flow as smoothly as possible. First, each participant will need their own pen and paper (five sheets of paper are ideal) to record notes throughout the session. We recommend preparing these sheets of paper in advance with the individual questions at the top of each sheet and stapling 5 sheets together for each participant. Having the question at the top of each page serves as a reminder for participants of what question they are to ask during the interviews (so they do not have to search for the question during the short interview time).

To determine the amount of sheets needed for 10 participants at Table 1, this would require 50 photocopies of the sheet – with the question assigned to Table 1 at the top. This strategy also saves time for the team at the end of the day when collecting all the field notes and sorting which sheets belong to each table.



Figure 4. Sample sheet for participant notes

We use 5 flip charts and different coloured markers during our SIM sessions. One flip chart is used by the facilitator to provide visual instructions for each step of the session, particularly indicating which tables are interviewing each other at each stage of the matrix. Figure 5 shows an example of how we display the instructions for each round of the interview matrix.



Figure 5. Instruction format for interview matrix

The other four flip charts and markers are placed at the participant tables so the groups can synthesize their findings and prepare to present them to the larger group. There are many flip chart styles to choose from —some have cardboard A-frames that stand on their own. In some sessions we placed these on the tables for the groups to use. Other styles include giant sticky notes that can be posted on walls, or traditional pads of paper that require a stand with clips to hold it on. Regardless of which style is used, each table needs a flip chart and paper so they can write down the top 3 themes which answer their question (the lettering needs to be large enough for the people at the other tables to see).

Additional items we use are name tags and a tent card for each table. When possible, we prepare the name tags in advance and double check the names are correct. We bring a few blank tags to have on hand if there are participants who were not registered but show up on the day (sometimes a participant will bring a colleague or friend along to participate). Again, colour coding your name tags and tent cards for labeling the tables (eg. TABLE 1) can help save time and prevent confusion throughout the day.

### Helpful Hint

The coloured markers we give out for the flipcharts are the same as the assigned colour for each table. This helps us when we are packing up after the session... the red flipchart notes are from the red table.

## Registration

As participants arrive for the SIM session, we greet them at the registration table. We typically use a long table at the entrance to the SIM room (out in the hall or just inside the room). Participants are welcomed, we confirm their registration for the session, register new participants, and give everyone their name tags. For research studies, the registration process also includes confirmation we have a completed consent form and an opportunity for participants to ask questions or express concerns.

For our SIM sessions, we typically assign people to specific tables ahead of the session and we prepare the name tags according to which group they will be in. We do this to maximize diversity at each table and create opportunities for networking and sharing knowledge. For example, we tend to assign people from the same organization or same expertise to different tables so they have an opportunity to meet new people they do not typically interact with.

## Facilitation: Step-by-Step Guide

As discussed earlier in the chapter, the SIM format follows three steps: 1) ***The Interview Matrix***, which is a series of 1:1 interviews between participants; 2) ***Small Group Deliberation***, where each table synthesizes the findings from the interviews; and 3) ***Large Group Plenary Discussion***.

As shown in Figure 1, each SIM session starts with an introduction where the leader of the project welcomes the participants, explains the project and outlines the plan for the session. The team may opt to do a presentation at this point to explain the project, but this additional time should be considered carefully – as well as any influence of the presentation on the results of the consultation.

During the introduction, the facilitator reads out all four questions and assigns one of the questions to each table. We find it is helpful to ask everyone if the question is clear or if any clarification is needed. This can be addressed with the large group to minimize delays during the interviews and improve accuracy of the information gathered.

In one of our SIM sessions focused on disaster resilience, the participants ask for clarification about how we defined ‘disaster’. We addressed this with the whole group before we started on the interviews so everyone was focused on the same definition. However, in another SIM session on the same topic, participants asked for clarification on our definition of ‘resilience’. Because one of our objectives was to understand how the group understood resilience, we explained that we did not have a set definition and wanted to learn from them what resilience was. This type of discussion can set the SIM process up nicely so everyone is clear on the scope of the exercise.

Following a review of the SIM questions, an overview of the process and the agenda, it is important to set some expectations for etiquette during the session. For example, the importance of respecting Chatham House Rules of confidentiality. Also the goal of gathering diverse viewpoints and being open to different perspectives. This part of the introduction sets a positive tone for the session and an atmosphere where participants can feel safe expressing their unique views.

The last part of the introduction is to explain the interview matrix and how to listen for guidance from the facilitator. We use the flip chart to explain the steps and show the participants how the rounds will be managed. We explain how the facilitator will time the interviews and tell everyone when to go, stop and switch. While it is directive, we introduce it in a lighthearted way so participants understand that it is structured. We also explain that confusion is normal —particularly during the first few rounds— and it is part of the fun. Typically after 3 or 4 rounds the group knows the routine and it becomes a smooth process.

### **The Interview Matrix:**

The first step in the SIM is the interview matrix —a series of 5-minute interviews conducted by the participants. This is the part of the consultation where each participant has an opportunity to ask their assigned question to participants from the other tables, and also to have a voice in answering the questions assigned to the other tables.

In each interview, one participant is asking their question to a participant from another table. The pairs switch at regular intervals, according to the instructions from the facilitator. For example, using the schedule in the text box below, during Round 1, participants from Table 1 ask their question to participants from Table 2, and participants from Table 4 ask their question to participants from Table 3. The interview is one-way, and by this we mean the interviewer asks the question to the interviewee, but it is not an exchange of ideas. The purpose of the

interview is for the interviewer to gather the responses from the interviewee and write the responses down so they can be added to the data for Step 2.

Using the same schedule, during Round 2, participants from Table 1 pair up with Table 3 to do the same type of interview. Participants from Table 4 find a participant from Table 2 to interview, and they repeat the same process. At this point, participants from Tables 1 and 4 will not have answered any questions, but they will have collected 2 responses to their question. They will have their turn in a subsequent round, as shown in the schedule below.

By Round 3, participants from Table 2 become the interviewers for Table 4, and participants from Table 3 are interviewed by participants from Table 1. This completes the task for Table 1 in terms of collecting data. They switch to be interviewees for the remaining rounds, as the participants from other tables gather responses to their questions.

By the end of Round 6, each participant has collected 3 responses to their question. The other members of their group will also have collected 3 responses. So everyone in the room has answered the questions from the other tables and participants from each table will have gathered input from the other tables to answer their assigned question. As one can imagine, this generates a lot of data in a short amount of time! But in addition to gathering opinions and ideas, participants have an opportunity to chat with people in the group they may not have known at the start of the day. The networking starts during this stage and continues as the steps progress.

### *Helpful Hint*

For ease of movement and managing the traffic of participants moving around the room, we find it helpful to instruct the groups that will be interviewed in a given round to go to their home table so the people doing the interviewing can find a partner to interview.

Rounds for the Interview Matrix			
Round 1:	1	⇒	2
	4	⇒	3
Round 2:	1	⇒	3
	4	⇒	2
Round 3:	1	⇒	4
	2	⇒	3
Round 4:	3	⇒	1
	2	⇒	4
Round 5:	2	⇒	1
	3	⇒	4
Round 6:	4	⇒	1
	3	⇒	2

Figure 6. Rounds for the Interview Matrix

It is not always possible to know exactly how many people will attend on the day of the SIM session. Things come up and people have to cancel at the last minute – or they miss the session and do not communicate. Facilitators will inevitably find themselves with different numbers of participants at each table. We have a solution for this – which Wayne refers to as *tag team!*

During the interviewing, when one table has more participants than another, 2 participants can pair up to conduct the interview (1 can ask the question and another can take notes) or one person can interview two people and they take turns responding. It is helpful to identify these uneven numbers at the beginning so participants can decide who will pair for the rounds. It may feel awkward the first time, but after a couple of rounds they won't think anything of it.

### **Small Group Deliberation:**

The second step in the SIM protocol is for participants to return to their assigned tables and synthesize the information their group collected during the interview matrix. The task here is to discuss the responses, participants can add their own views on the question, and the group can condense the information into the top 3 themes which respond to their assigned question. As guidance for the small group process, we suggest they start with each person sharing the information they collected during their interviews —after everyone has finished sharing, they can add their own comments in response to the question.

Of course, condensing the responses to the top 3 is a challenge! This is part of the process. Through active engagement and deliberation, participants in each group immerse themselves in the question — innovation and solution-oriented thinking is often the result (see O’Sullivan et al., 2014 for more information about this).

We typically have a notetaker at each table for this step – to write down notes from the discussion. In the context of a research study, we also put 2 audio recorders on each table to record the conversations. These recordings are later transcribed verbatim and analyzed using qualitative methods.

### **Large Group Plenary Discussion:**

The final step of the SIM protocol is the large group plenary discussion. At this point in the session, the participants are all together and the discussion is facilitated by the leader of the session. To begin the plenary discussion, each table presents their top 3 themes for their question. The large group then has the opportunity to comment on the findings and engage in more discussion about the topic. The facilitator can interject with probe questions to guide the direction of the discussion – particularly if the team has any sub-topics they wish to explore.

After each table presents their findings, the discussion focuses on what they presented. The facilitator can ask the group whether the findings represent their understanding of the topic, or if there is anything new they wish to bring up.

We typically have notetakers remain at each table for the plenary discussion – to write down notes. For research studies we keep the audio recorders on for this part of the session to record the large group conversation. These recordings are later transcribed verbatim along with the small group recordings and analyzed using qualitative methods.

## Planning the Data You Need

Depending on your reason for hosting the SIM session, you may want to record different parts of the discussion. For our research projects, we put a recorder on each table to record the discussion during the small group discussion in Step 2 and we keep it running through to the end of Step 3, which is the large group discussion. We do this for several reasons. First, it ensures we have the full picture of how the field notes from the interviews were synthesized during the small group discussion. This discussion is where the top 3 points for each question are decided, so it is important for our research projects to know how the groups arrived at their synthesis points. Second, in many of our projects we are interested in the analyzing the collaborative process during community consultations. So the discussions taking place during the SIM are important sources of data to help answer our research questions. Finally, in the large group discussion (Step 3) the discussion happens quickly, so the recordings help us with identifying any further concepts that emerge about each of the questions – as well as new questions that typically come up during the discussion.

### *Helpful Hint*

The crosstalk on recordings can make it difficult to transcribe. One strategy for large groups is to have an extra room or two for a couple of the tables to move to during Step 2.

## Creating the Questions

The following are some sample questions we used in a graduate class focused on community health interventions. We used these questions to demonstrate the SIM method.

1. What do you think are some of the most important attributes of an effective community health intervention?
2. How would you conceptualize ‘complexity’ in community health?
3. What have you noticed about ‘theory’ in the community interventions you have read about?
4. What strategies would you use to enhance collaboration among partners in a community health intervention?

## Sample Schedule for In-person SIM Session

12:00 – 12:30pm:	Registration
12:30 – 1:15pm:	Welcome and Introduction to the SIM Session Roundtable of Introductions
1:15 – 2:15pm:	SIM Session - Interviews
2:15 – 2:30pm:	Refreshment Break
2:30 – 3:15pm:	SIM Session – Small Group Deliberation
3:15 – 4:00pm:	SIM Session – Large Group Discussion
4:00 – 4:15pm:	Wrap-up and Closing Remarks

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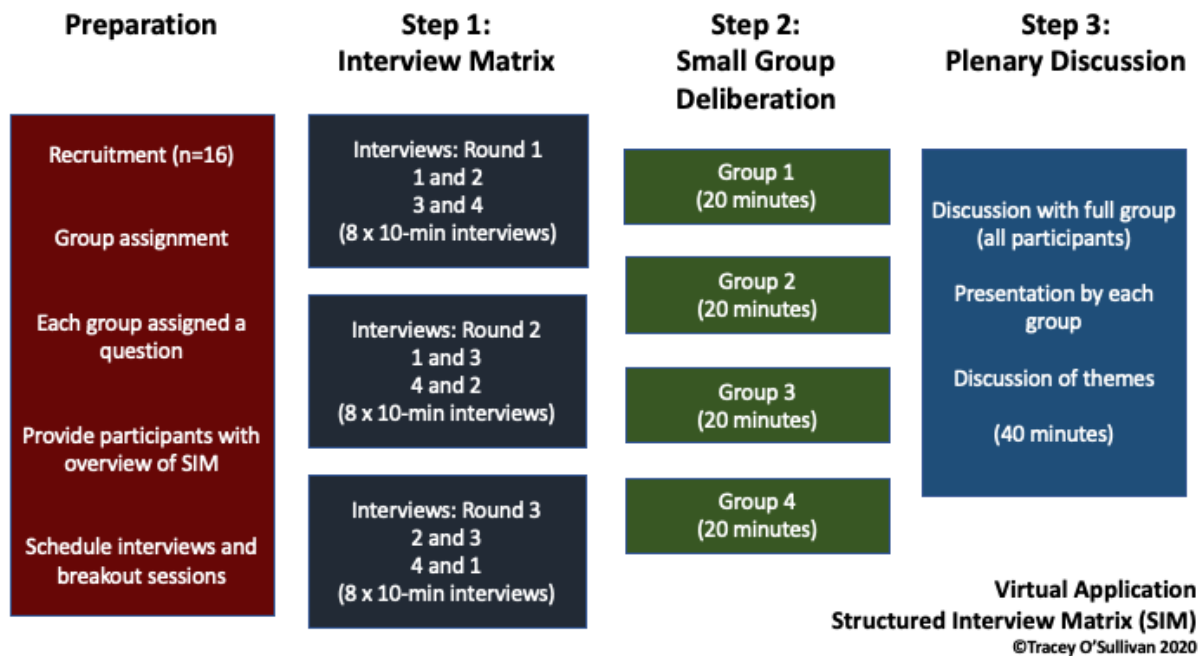
## Conducting a Virtual SIM Session

Tracey O’Sullivan, Yasmin Khan, Madelyn Law & Michelle Pang

In 2020, in response to pandemic restrictions, our research team adapted the in-person SIM protocol to an online setting. We piloted the protocol with students in our university classes, to see how we could maintain the interactive nature of the SIM consultation while using break-out rooms on an online platform.

It worked!

Here we present our virtual SIM session protocol, which follows a similar process to the in-person format described above. The main adaptations include a reduction to the number of interview rounds for the matrix, 2) management of interview data, and 3) adjustments required for facilitating online group discussions.



**Preparation:** In our experience, this virtual protocol works best with 8 to 16 people. This is smaller than in-person SIM sessions and is reflective of challenges with online group discussions (where one person can speak at a time) and processes for coordinating break out rooms. When many people are logged in to a virtual meeting it takes more bandwidth; for people with wifi limitations, the smaller meeting makes it easier for full participation.

For a virtual SIM session, people are provided with the link and password to login to the virtual meeting platform. The team can decide whether a waiting room feature is needed. While the waiting room provides control for the session leaders, the drawback is when participants lose their connection and have to login again, the facilitator may not realize they are in the waiting room. It may be helpful in this case for another member of the team to be the host and monitor the meeting logistics.

To start the session, the facilitator welcomes everyone and does a similar introduction to the one described above for the in-person SIM (overview of the project or reason for the session, round of introductions, brief explanation of the steps of the SIM, and guidelines for participation). After the introduction, the facilitator goes over the 4 questions that will be the focus of the interview matrix, and then assigns people to one of four groups (similar to tables for in-person session).

Note: It is necessary to explain (re-confirm) what each group is to do with their question, and then explain they will be assigned a breakout room to do the interviews. We tell the group that we will broadcast a message letting them know when the time is half done and again when

there is one minute left. A notable difference for a virtual SIM is the group members will not be sitting at a table together with the option of making eye contact and whispering to each other to confirm their understanding of the instructions (which is often the dynamic in the room during an in-person SIM). Therefore it is important that each person understand what they are to do during the interview matrix rounds before opening the breakout rooms.

**Step 1 - Interview Matrix:** For a virtual SIM, our team does 3 interview rounds. This is a distinct difference from the in-person SIM protocol. For a session with 16 participants, there are 8 interview pairs for each round. The interview pairs are participants from different tables — according to the sequence shown below. For round 1, each of the four participants from group 1 will be paired with a participant from group 2. Participants from group 4 will be paired with a someone from group 3. In total, 8 breakout rooms are needed for each round and each pair is invited to join the breakout room to do their interview. It takes some time to assign the participants to breakout rooms. It may be helpful to have another team member as the host to help with this.

We find 10 minutes is enough time to do each round of the virtual interview matrix. The pairs are instructed to switch roles as interviewer-interviewee after the first 5 minutes so the other person can be the interviewer and gather the information for their question. After the first round, each person will have provided input on the question from the other table and they will have collected information for their question.

The process is repeated for each round – with new interview pairs assigned according to the sequence. By the end of the third round, each person will have answered the questions from the other groups and they will have collected information for their question from 3 people in the other groups.

Note: Similar to the in-person SIM sessions, when there is an uneven number of participants in each group, it is necessary for some participants to partner with another member of their group to do the interviews. The tag team is described above for the in-person SIM sessions.

Rounds for the Virtual Interview Matrix			
Round 1:	1	↔	2
	4	↔	3
Round 2:	1	↔	3
	4	↔	2
Round 3:	1	↔	4
	2	↔	3

**Step 2 – Small Group Deliberation:** The small group deliberation step for the virtual SIM is where each group meets in a break out room to synthesize the information gathered for their specific question. An important consideration for this step is to determine who will take notes for the group —and for a research study whether this step will be audio- or video-recorded.

For an in-person SIM session in a research study, we put a recorder on the table for each group and have a notetaker from the team to document the discussion and any observations. Each group is given a flipchart to present the top 3 responses to their question. For a virtual SIM, this process is not as straightforward, given the logistics of recording and taking notes. The team needs to plan how this will work with the participants attending and what type of notes/recordings are needed for the project.

We recommend teams confirm (and practice) the recording processes for the platforms they plan on using. At the time we were piloting this method on Zoom, only main room recordings could be exported to the cloud. For breakout rooms, the recording must be initiated manually by someone in the breakout room and whomever initiates the recording receives the file on their computer. For data collection in a research study, this creates challenges for managing data securely. Our solution for this is to have a member of the research team in each breakout room to initiate the recording and take notes for the group as they synthesize their findings. This way, the recording is managed/received by a member of our research team. In the absence of flip charts, the notetaker prepares the points for the group in advance of the plenary discussion.

Another difference in our protocol for a virtual SIM is the length of time we allocate for step 2. In our experience, 20 minutes is sufficient for the deliberation and synthesis. It is half the time we allocate for an in-person SIM, however the additional time for in-person sessions accommodates chit-chat that occurs while people get refreshments and come back to the table.

**Step 3: Plenary Discussion:** The final step in a virtual SIM is similar to the in-person format. It is the large-group plenary discussion, where each group presents their synthesis of the top 3 themes for their assigned question. The notes which would normally be displayed on a flipchart are pasted into the chat, and a spokesperson from each group presents the synthesis.

In the virtual format, an important consideration is that only one person can talk at a time. In our experience, people are now accustomed to putting comments in the chat during a meeting, so it is important to have a team member monitoring the chat while the facilitator focuses on animating the discussion. For step 3, the host can initiate the recording in the main room and have the file exported to the cloud or the team's computer. We find it helpful to have notetakers present to take field notes about the discussion and observations.

Similar to step 2, we find the plenary discussion tends to be shorter during a virtual SIM. A distinct difference in the group dynamic in the virtual format is the inability for participants to talk to one another informally while the discussion is taking place. During an in-person SIM session in a large room, it is typical to have sidebar chats happening periodically at the tables,

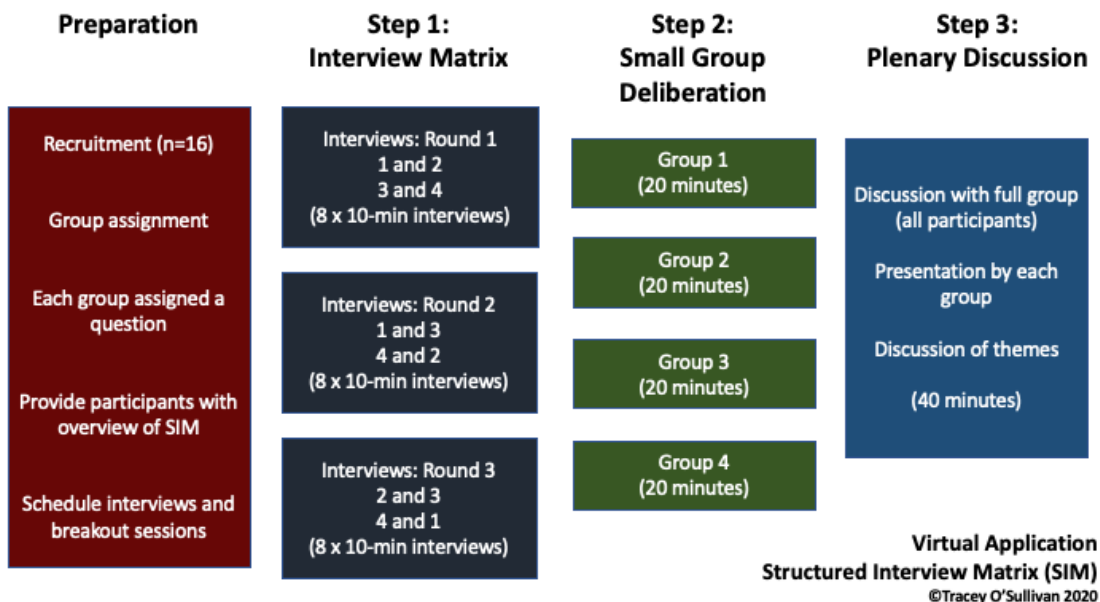
where people are quietly saying something to the person beside them. This is an important aspect of networking and is often replaced with informal communication using the chat function on Zoom or other platforms.

## Virtual Facilitation Tools

As facilitators for the virtual SIMs, we find it helpful to share our screen and show the following set of instructions on powerpoint slides during the introduction, while explaining the process. This way participants can read the instructions if they are having trouble hearing the audio —or if they prefer visual instructions. These descriptions can also be used when training facilitators how to conduct a virtual SIM session.

We offer our permission for facilitators to use these tools in your virtual SIM sessions, provided our team and this guide is acknowledged as the source.

**Suggested citation:** O’Sullivan,T., Khan, Y., Law, M. & Pang, M. (2022). Conducting a Virtual SIM Session, in the Structured Interview Matrix (SIM) Facilitator’s Guide, EnRiCH Lab, University of Ottawa.



## Step 1: Online Interview Matrix

- Each participant is assigned to a group (1, 2, 3, 4) and each group is assigned a question
- During this round, members of each group will gather answers to their question by interviewing participants from the other groups (3 interview rounds)
  - Eg. if I am in group 1 I will ask my assigned question to 3 other participants from the other groups
- There are 3 rounds of interviews (10min each) – in each round, participants enter the breakout room they are assigned to for that round
- During each interview – participants take turns asking their question and write down the responses from the other participant. \*\* Please make sure to write down the answers given, because you need this later when you go back to your group and share what you learned
- At the end of the 10-minute interview, please leave your breakout room and return to the main room for instructions on the next round

## Step 2: Small Group Deliberation

- For Step2 participants meet with their assigned group in a breakout room (rooms labeled by group #)
- During this round, each participant shares what they learned from the interviews with the other participants. (At this point group members can add in their own responses to this question as well)
- The task for this step is to synthesize the responses to the question and summarize into 3 main points
- To facilitate this process, each group should nominate someone in the group who can take notes from the discussion and type them into the chat for the group
- By the end of Step 2, each group should have a list of their 3 points that can be typed into the chat when the group returns to the main room. Each group should also have a designated speaker for the group who can present the synthesis to the other groups in Step 3
- At the end of the small group deliberation, please leave your breakout room and return to the main room for instructions on the next round

## Step 3: Plenary Discussion

- The final step is the plenary discussion where all participants gather in the main room so each group can present their synthesis.
  - Each group will be asked to type their synthesis into the chat section of the main room before their group presentation, so all participants can see the list.
  - Following each presentation, the participants from the other groups can ask questions or comment on the synthesis presented by each group.
  - New ideas often come up during this step - participants are welcome to add new ideas or pose questions
  - To ensure smooth flow of the conversation, participants can raise a hand to speak or type into the group chat.
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## Further Readings: (Studies Using the SIM Method)

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