Convenings as a tool for enhancing implementation strategies: lessons from the Black Women First initiative

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Abstract

Background *The Expert Recommendations for Implementing Change (ERIC) project* identified 73 strategies for supporting the implementation of a novel intervention and evidence-informed practices. In this paper, we explore convenings, which engage stakeholders in proactive dialogues, as a mechanism to deliver multiple strategies that support sites adapting and implementing evidence-informed bundled interventions for Black women with HIV.

Methods We use an instrumental case study design to explore strategies embedded in biannual convenings hosted by the Black Women First Initiative (BWF) Evaluation and Technical Assistance Provider (ETAP). Data sources including planning documents, direct observation of the convenings and analysis of convening attendee feedback surveys were analyzed.

Results Using instrumental case study design, we found that convenings were a helpful tool that allowed for cross-site communication and collaboration. Communal re-examination of implementation strategies, coupled with training and network-weaving, created a rich learning environment to identify potential intervention adaptations and changes, unify on data collection, and prepare to test these adaptations at each respective site.

Conclusions We discuss lessons learned when using convenings to help health care and community-based settings collectively explore and address adaptation and implementation barriers as they implement evidence-informed interventions to improve health outcomes for populations affected by chronic conditions, such as HIV.

Keywords Convening, Implementation, Bundled interventions

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Contributions to the literature

- Convenings are an implementation strategy that can contain a myriad of additional implementation strategies in their purpose, structure, and planning.
- Recurring, project-wide convenings provide an iterative setting for multisector collaboration to identify and mitigate challenges in implementation and tailor interventions to improve quality and retention in care.
- Implementation is inherently a social process and convenings should be seen as a strategy that strengthens that process. Convenings balance horizontal project leadership with a vertical systems approach to equitably engage a variety of stakeholders in identifying and sharing resources and building social capital.

Introduction

Convenings have traditionally been used to facilitate collaboration for the improvement of professional practices through preparation and education [1]. In prior literature, the term "convening" is defined as "a gathering that brings together a diverse group of participants for a clear purpose and generates insights or action beyond what any single participant could achieve on [their] own."[2(p. 78)] The term has been used to refer to a variety of events including conferences, meetings, workshops, and symposia [2]. For the purposes of this paper, "convening" refers to the opportunity to bring people together for community building, idea sharing, collaborative learning, planning, and technical assistance and training. The convenings discussed in this paper are community-centered, process-based, and wide in topical scope; they differ from some other formats (e.g., learning collaboratives) that focus on a specific topic area presented by experts with some community input during planning [3].

Convenings are composed of diverse stakeholders and are designed to leverage participant experience and expertise to generate new insight. The approach differs from regularly scheduled internal meetings at individual organizations that are usually focused on administrative topics and delivering select information [2]. Convenings are also distinct from other collective strategies, as they are action-oriented and an opportunity for peer-to-peer learning and exchange of ideas [4, 5]. Because implementation is an inherently social process, effective convenings balance a horizontal and vertical systems approach to ensure stakeholders are equitably engaged and key administrative decision making is not explicitly delegated to one person or organization [6]. In a convening, the attendees are participants in a collective effort that serves a specific shared purpose [2].

Convenings are well-suited to support the adaptation and implementation of evidence-informed interventions as they can authentically engage stakeholders, including community members, implementors, researchers, technical experts, and funders in proactive dialogue in a single generative space to strengthen resources and social capital [1]. The gaining of social capital increases trust, social belonging, and participation in community knowledge and action, all of which can be translated from the setting of the convening into the work of demonstration site staff and partners serving Black women with HIV [7]. Convenings incorporate systems thinking tools and practices such as multi-sector collaboration, iterative learning, and developing transformational leadership [6].

This paper describes how the Evaluation and Technical Assistance Provider (ETAP), funded through the Minority HIV/AIDS Fund and the Health Resources and Services Administration's (HRSA) HIV/AIDS Bureau's Ryan White HIV/AIDS Program Part F Special Projects of National Significance Program initiative, Improving Care and Treatment Coordination: Focusing on Black women with HIV (BWF) Initiative used convenings to address multi- and individual-site successes and barriers associated with the implementation of evidence-informed interventions. The paper also explores additional implementation strategies that are embedded in convenings. The BWF Initiative is comprised of the ETAP led by University of Massachusetts Lowell and in collaboration with its partners at AIDS United (AU), the Boston University School of Social Work (BUSSW), the Health Disparities Institute at UConn Health (HDI), Impact Marketing + Communications, and twelve demonstration sites around the country to design and implement bundled interventions to improve care and treatment coordination for Black women with HIV. As part of the BWF Initiative, HRSA SPNS selected and funded each of the demonstration sites to implement evidence-informed bundled interventions to address the specific health needs of Black women with HIV in their community.

Methods

Instrumental case study design was employed to characterize implementation strategies embedded in the convening [8, 9]. Three data sources were used: analysis of planning documents, direct observation of the convenings, and analysis of convening attendee feedback surveys.

Observations were conducted during convenings by ETAP staff and researchers with the overall goal of examining the format and execution of the convening, how the convening supported implementation, and the ways in which site staff engaged in the convening. Convening documents, including run of show meeting materials,

Rocco *et al. Implementation Science Communications*   (2024) 5:109

Page 3 of 8

planning emails and meeting notes, and evaluations, were reviewed using qualitative data analysis techniques.

Two types of data analysis were employed: holistic analysis of the case, and embedded analysis of specific parts of the case [8]. Convening run of show documents, notes, and sessions slide decks were examined thematically, and a chronology of events was constructed in addition to key themes to explore the case [8]. The researchers repeatedly reviewed convening materials to map and identify themes from run of show documents and session agendas that mirror evidence-informed implementation strategies from Powell et al. as part of the Expert Recommendations for Implementing Change (ERIC) Project [10]. The larger narrative within the data, including implementation strategies present within the context of the convening, was discussed with ETAP members to elicit feedback and further hone in on lessons learned. Illustrative quotes from post-convening participant feedback surveys were extracted to further demonstrate the effective use of implementation strategies within the BWF Convening structure [11].

The BWF convening structure

The BWF ETAP hosted multi-site, multi-day convenings on a biannual basis. Since project inception in 2020 to the end of project year three in 2023, a total of six convenings were hosted by the ETAP to enhance the implementation of evidence-informed bundled interventions. While in previous HRSA-funded projects, convenings have been held in person, the BWF convening structure was adapted to a virtual setting due to the COVID-19 pandemic for the first four convenings. These convenings were hosted over Zoom. Convenings were attended by HRSA staff, BWF demonstration site staff, ETAP staff, and ETAP Advisory Council members. Each organization was required by the funder to send at least two participants to attend the convenings. Attendees were selected based on consultation with the ETAP and the theme of the convening. BWF demonstration site budgets covered staff travel costs for in-person convenings. ETAP staff paid convening location costs and subject matters experts when necessary. Sites could engage in training opportunities on their own and the ETAP provided additional trainings on identified topic areas at least bimonthly, but convenings were the only spaces where training was standardized and facilitated simultaneously for all 12 demonstration sites.

Preparation for every convening was facilitated by a convening planning committee. This committee was composed of representatives from the key stakeholders of the initiative: HRSA, ETAP, site staff, and advisory council members. The convening planning committee met biweekly over two months to design the convening

agenda around the technical assistance needs of BWF demonstration site staff and the project's work plan. The structure and planning of each convening was informed by Paulo Freire's popular education pedagogy [12]. Freire theorized that education must be contextualized in the lived experience of those engaging with it [12]. Following major principles of the pedagogy, convening purpose, objectives, and sessions offered were contextualized in the concrete experiences of demonstration site staff and sought to empower staff to inspire social change alongside their clients [12].

The convenings themselves consisted of a blend of presentations, peer-to-peer learning sessions, and training and technical assistance sessions. Sessions were facilitated by ETAP members, site staff, and guest speakers. At the convenings, BWF ETAP members shared roles in facilitating icebreakers and energizers, moderating sessions, and taking notes. When convenings were hosted virtually, recordings of each session were saved and stored. Table 1 outlines the range of topics that have been explored at each convening. The ETAP utilized feedback from previous convenings and other meetings with demonstration site staff to inform what topics would be incorporated at the next convening, as well ETAP responsibilities outlined in yearly work plans and grant deliverables.

Feedback was solicited from convening attendees through brief end-of-day surveys and longer, more comprehensive end-of-convening evaluation surveys. Feedback was then synthesized by ETAP partner AIDS United into summary reports to be discussed and reviewed by ETAP members. Information and feedback collected from these surveys were used to inform the next convening's purpose, objectives, and sessions.

Results

Through document review, qualitative analysis of participant feedback surveys, and critical collective reflection as convening facilitators, we identified 11 inter-connected ERIC Project strategies that are embedded into BWF Convenings to address successes, barriers and challenges that BWF demonstration sites faced in implementing the evidence-informed bundled interventions [10]. Our findings revealed that these strategies were either purpose- or planning-oriented. The purpose-oriented goals and structure of the BWF Convening were congruent with two implementation strategies in particular: (1) Use data experts and (2) Obtain and use patient and consumer feedback [10]. The planning-oriented goals of the convening aligned with nine ERIC Project implementation strategies: (1) Make training dynamic; (2) Promote network-weaving; (3) Capture and share local knowledge; (4) Create a learning collaborative; (5) Develop academic

Rocco *et al. Implementation Science Communications*   (2024) 5:109

Page 4 of 8

Table 1 About the BWF convenings, 2020–2023

Convening	Location	# Registered (ETAP, HRSA, Site Staff)	Convening Topics
December 2020	Virtual	108	• Promoting Holistic Health & Health for Black Women with HIV • Promoting your Bundled Interventions • Stakeholder Engagement and Marketing • Data Management Training • Bundled Intervention Discussion • Embodying Meaningful Involvement of People Living with HIV
August 2021	Virtual	128	• Meaningful Involvement of Black Women with HIV • Centering Racial Justice in Our Programs and Organizations • Racial Equity Action Planning • Utilizing a Community-Based Participatory Research (CBPR) Approach to Share Your Story • Developing Your BWF Implementation Manual
February 2022	Virtual	131	• Recruitment and Retention • Cultural Humility • Meaningful Involvement of People with HIV/AIDs in Action • Photovoice • Gender Affirming Care • Strategies to Enhance Provider Self-Care • Racial Equity Action Plans • Implementation Manuals • Program Sustainability
September 2022	Virtual	81	• Relationship Building Between Black Cisgender and Transgender Women • Program Sustainability • Black Women's Health • Community Advisory Board (CAB) Leadership Development
April 2023	Philadelphia, PA	81	• Developing a Women Advisory Council • Racial Equity Action Planning • Adaptations • Fostering Relationships Among Black Cisgender and Transgender Women • Photovoice • Effective Trauma Response Strategies when working with clients • How to Become Friends with your Data • Black Women with HIV and Motherhood • Implementation Manual and Dissemination Strategies
August 2023	Rockville, MD	70	• Evaluation Outcomes • Reflecting On the Value of Bundled Interventions • Lessons Learned and Implications for Future Ryan White HIV/AIDS Programs • Photovoice: Sharing of Photovoice Projects • Public and Dissemination Planning • Adaptations to Interventions Showcase

partnerships; (6) Promote adaptability; (7) Tailor strategies; (8) Conduct educational meetings; and (9) Provide ongoing consultation [10].

These strategies, as well as where and how they are present in the BWF convening, are mapped out and described in Tables 2 and 3. Table 2 outlines the purpose-oriented implementation strategies, which intended to examine and address specific aspects of the implementation of the bundled interventions through training, technical assistance, and collaborative learning sessions. Table 3 highlights planning-oriented implementation strategies that focused on building social capital through knowledge sharing and personal and professional network weaving opportunities. Attendee

feedback from post-convening evaluation surveys was incorporated to exemplify lessons learned from the use of each implementation strategy.

Overall, engagement in all convenings was high. Due to the COVID-19 pandemic, we had the opportunity to host convenings both in-person and remotely via Zoom and found that attendance was higher at virtual convenings than in-person ones (see Table 2). We believe this is because virtual convenings allowed participants to attend some sessions rather than having to commit to a multi-day in-person event. However, we found that in-person convenings allowed for more opportunities for network-weaving and personal connections across sites than virtual convenings.

Rocco *et al. Implementation Science Communications*   (2024) 5:109

Page 5 of 8

Table 2 Purpose-oriented implementation strategies present in BWF convenings

ERIC Implementation Strategy	Convening	Session Title	Session Objectives	Attendee Feedback
Use data experts	April 2023	How to Become Friends with Your Data (Breakout Discussion)	Participants will have the opportunity to attend a breakout session to further their knowledge on a specific topic to support their work.	*"There are some amazing ideas that we can jump off from the data and it was a great opportunity to meet with other data people."* *"Clarified logistics for data analysis and acquiring data from ETAP"*
Obtain and use patient/consumer feedback	April 2023	Lessons on Developing Women Advisory Councils (Plenary)	(1) Participants will learn lessons for developing a Women Advisory Council and/or Community Advisory Board (CAB). (2) Participants will discuss next steps for fostering Black Women leaders.	*"Provide learning sessions to build leadership skills and continue to learn from our CAB members"* *"Integrate (CABs) into program, compensate (them), and develop for leadership"* *"CABs are an essential voice in our organization and will be a part of our sustainability plan"*

Discussion

Throughout the BWF initiative, convenings were utilized by the ETAP to converge site staff, community partners, key stakeholders, and training providers to enhance and effectively adapt the implementation of evidence-informed bundled interventions for Black women with HIV. Consistent with the literature, we found that convenings were a helpful tool that allowed for communication and collaboration on implementation-related problem-solving across BWF demonstration sites [2]. The Rockefeller Foundation highlights convenings' ability to build community, share insight, and facilitate action beyond what an individual could do on their own [2]. Participants in the BWF convenings similarly shared that the convenings were an intentionally collaborative "jumping off point" that helped to promote new ideas about implementation while generating social capital across sites [1].

The communal re-examination of implementation strategies, coupled with dynamic training and network-weaving, created an environment rich with continual opportunities to customize universal learnings for each respective site. Convenings are, by design, an optimal opportunity to identify potential changes and adaptations to interventions, unify on data collection practices to measure their impact, and prepare to test these adaptations at each respective site [3]. BWF convening participants reported that this collaboration regarding the success of the implementation adaptations across sites over time was helpful to their respective sites.

Through this initiative's use of the convening, we have learned that convenings create collaborative spaces to assess and understand processes integral to the implementation of bundled interventions. The success of convenings for the BWF initiative stems from our intentional efforts to tailor the convenings to project scope and purpose, meaningfully engage experts through our advisory council, and continuously adapt content in response to the needs and interests of convening attendees. This finding emphasizes the importance of amplifying collective knowledge and experience in convenings and trusting in the needs and expertise of the participants and their respective communities [2].

This work is not without limitation. While we tracked the number of site staff, HRSA staff, and ETAP staff who registered to attend each convening, we did not capture how many of those attended all or part of the convening. Although we found that convenings are a dynamic and multifaceted way to support implementation by bundling multiple implementation strategies, we did not set out to study convenings themselves. While we evaluated the convenings and analyzed observations and convening documents, few attendees participated in the evaluations of every convening. Additionally, the evaluation of convenings conducted in the BWF initiative did not focus on measuring effectiveness of implementation strategies and outcomes. Thus, more data is needed on the benefits of the convening as it relates to how convenings benefit implementation, adaptation, and adoption of evidence-informed interventions. Nonetheless, this instrumental case study analysis provides important insight into the ways in which implementation strategies can be bundled in the context of a convening and provides a roadmap for those interested in utilizing convenings as a strategy to support adaptation and implementation of evidence-informed interventions across a variety of organizational settings.

For those interested in utilizing convenings as an implementation strategy in future multi-site programs, we recommend the following:

- Engage key community members and stakeholders in the planning, feedback, and implementation processes of the convening;
- Tailor convenings to specific implementation aims and be responsive to team and community priorities;

Table 3 Planning-oriented implementation strategies present in BWF convenings

ERIC Implementation Strategy	Convening	Session Title	Session Objectives	Attendee Feedback
Make training dynamic & Promote network weaving	Every Convening	December 2020, August 2021, February 2022, September 2022, April 2023, August 2023 Multisite BWF Convenings	February 2022 Convening Objectives: (1) Strengthen relationship of recipients & share lessons on implementation of bundled interventions (Breakout Presentations) (2) Identify ways to prepare for program sustainability (Plenary) Discuss progress on the multi-site evaluation data collected to date and dissemination of products (Plenary)	*"I believe this was a great mix of group time and breakouts. It allowed for cohorts to meet other teams a bit more personally, as well as learn from other cohorts that are sharing similar interventions."*
Capture and share local knowledge & Create a learning collaborative	Every Convening	Site Updates (Breakout Presentations)	(1) Participants will describe their site-specific bundled interventions (2) Participants will understand the site's implementation plans and progress (3) Participants will enhance relationships among their cohort	*"How sharing progress across the different sites can be impactful to the progression of other sites."*
Develop academic partnerships	August 2021	Utilizing a Community-Based Participatory Approach to Share Your Story with BUSSW	(1) Participants will increase knowledge related to participatory research approaches and client driven research. Participants will understand arts-based strategies for engaging clients in research and action.	*"CBPR evokes a great sense of community and equality, when researchers deliberately/intentionally include community members in/at each step, or phase of the research are involved not just among within CCT, When you come here, there are no big guys, no little geezers. Everybody is together."*
Promote adaptability & Tailor strategies	April 2023	Adaptations and Lessons Learned (Cohort Discussions)	(1) Participants will discuss adaptations made to their bundled interventions (2) Participants will discuss lessons learned, successes and challenges when adapting their bundled interventions	*"The meaning of trauma, meeting individuals where they are and understanding the interventions and best practices" "Connection between HIV stigma and IPV, self-care needs to be put into policies and protocols...building relationships are key to successful implementation"*
Conduct educational meetings	February 2022	Cultural Humility (Plenary)	(1) Participants will identify and define four cultural humility pillars that will impact service delivery. (2) Participants will gain ongoing awareness of and critique their cultural lens, biases, power, privileges, and identities on a macro and micro level. (3) Participants will recognize the provider/client relationship that occurs within the community's context, which includes its history, politics, economics	*"We should include a discussion about cultural humility during our Stigma Reduction training for providers at our implementing partner site." "I was reminded that we should use trauma informed care as well as trauma informed engagement even with colleagues."*

Rocco *et al. Implementation Science Communications*   (2024) 5:109

Page 7 of 8

Table 3 (continued)

ERIC Implementation Strategy	Convening	Session Title	Session Objectives	Attendee Feedback
Provide ongoing consultation	February 2022	Program Sustainability with Washington University Center for Public Health Systems Science (Plenary)	(1) Discuss plans and indicators for program sustainability (2) Participants will discuss the importance of sustaining their programs and engaging leadership at their organizations in the process (3) Participants will learn how to measure sustainability of their programs, i.e., Program Sustainability Assessment Tool (PSAT)	*"Looking forward to taking the assessment with my team and getting more TA support from the facilitator if possible!"*
	September 2022	Program Sustainability with Washington University Center for Public Health Systems Science (Plenary)	(1) Participants will be assigned to a breakout room based on PSAT results and desired focus area domain (2) Participants will learn how to use the results to indicate program sustainability (3) Participants will use the results from their individualized assessment to pull together a plan to sustain their program	*"(1) Our site excels with communication, evaluation, and program adaptation; (2) Other sites are looking for funders in non-traditional spaces to sustain program components; (3) Communication across teams is important to having a sustainable program"*

Rocco *et al. Implementation Science Communications*   (2024) 5:109

Page 8 of 8

- Utilize convening sessions as catalysts for systems change and sustainability planning;
- Monitor and evaluate the contributions of convenings to implementation and sustainability.

Conclusion

Overall, we learned that convenings are a useful implementation strategy that generate social capital through innovation, collaboration, and the amplification of community expertise. We conclude that a convening should be seen and utilized as its own implementation strategy that can contain a myriad of implementation strategies, depending on convening purpose, structure, goals, and session objectives. Because convenings are most effective when tailored to the needs and goals of those using them, they do not necessarily align with any one discrete implementation strategy, but rather allow for infinite customizable combinations of strategies. We recommend that the ERIC Project encourage people to bundle implementation strategies and found that convenings are an especially effective way to do so, particularly across multi-site initiative programs. Future research is needed measuring the impact of utilizing bundled implementation strategies versus individual ones. Projects and studies aiming to strengthen implementation strategies would benefit from investing in resources and hosting regular convenings to facilitate collaboration and innovation amongst community members and stakeholders, as well as consider additional ways to evaluate the convening structure to contribute to literature of convenings as an implementation strategy.

Authors' contributions
MR: conceptualization, initial draft, literature review, data analysis, and writing; MK: literature review, data analysis, and writing; CFR: conceptualization and initial draft; AD: writing (review and editing); JCS: writing (review and editing); SR: writing (review and editing); AWW: writing (review and editing); LSM: supervision, conceptualization, methods, and writing.

Availability of data and materials
The data sources used for the current study are available on reasonable request.

Declarations

Ethics approval and consent to participate
The evaluation protocol was reviewed by the University of Massachusetts Lowell, and the Boston University Charles River Campus Institutional Review Boards (IRB), protocol numbers 20–147 and 5832X, respectively. All methods were carried out in accordance with relevant guidelines and regulations and informed consent was obtained from all subjects.

Consent for publication
All authors consent to the publication of the manuscript in *Implementation Science Communications*. We certify that the manuscript represents valid work and that neither this manuscript nor one with substantially similar content under our authorship has been published or is being considered for publication elsewhere.

Competing interests
The authors have no interests to declare.

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