

Engaging Key Partners to Design and Conduct High Quality Clinical Research

June 5-6, 2018

Health Sciences Learning Center (HSLC)
750 Highland Ave, Madison, WI

Provided by

University of Wisconsin School of Medicine and Public Health

UW Institute for Clinical and Translational Research Community-Academic Partnerships (ICTR-CAP)

University of Wisconsin–Madison Interprofessional Continuing Education Partnership (ICEP)



Community-Academic Partnerships

UW Institute for Clinical and Translational Research



**Interprofessional
Continuing Education Partnership**
UNIVERSITY OF WISCONSIN-MADISON

School of Medicine
and Public Health
School of Nursing
School of Pharmacy

ABOUT THE SHORT COURSE

Learn more about the 1.5 day short course and its focus on methods of stakeholder engagement critical to the success of clinical research. Through didactic and experiential learning activities, you will gain skills to engage stakeholders (e.g., patients, community members, industry, clinical sites, payers, and government agencies).

COURSE OVERVIEW

Research studies that lack input from relevant stakeholders can lead to problems with feasibility and recruitment, and can produce findings that are not meaningful or actionable in real world settings. Many clinical researchers are unfamiliar with best practices to effectively engage stakeholders in their research. This course will provide experiential and didactic activities to develop skills for engaging relevant stakeholders.

ELEMENTS OF COMPETENCE

In addition to knowledge, this CE activity has been designed to change learner competence and focuses on the American Board of Medical Specialties' areas of practice-based learning and improvement, professionalism, interpersonal skills and communication; the interprofessional and nursing competencies of values and ethics, roles and responsibilities, interprofessional communication, teams and teamwork; the pharmacy competencies of foundational knowledge, personal/professional development, and communication skills; and the IOM competencies of patient-centered care, working in interdisciplinary teams, and quality improvement.

PRACTICE GAPS & NEEDS

Traditionally, health research has been conducted by scientists and experts with very little input from key stakeholders (those who are impacted by the topic of study). This lack of input has led to research that is poorly aligned with the needs and priorities of patients and other stakeholders, which hinders the translation of research findings into practice and slows progress in improving health outcomes. Research studies that lack input from relevant stakeholders can lead to problems with feasibility and recruitment, and can produce findings that are not meaningful or actionable in real world settings.

Stakeholder engagement is defined as the *“meaningful involvement of patients, caregivers, clinicians and other healthcare stakeholders throughout the research process – from topic selection through design and conduct of research to dissemination of results.”* Evidence suggests that engagement leads to research questions and outcomes that are more meaningful and relevant to patients and other stakeholders. Engagement has also been shown to improve the quality and appropriateness of research. Additional hypothesized benefits of engagement include more efficient dissemination and implementation of findings, improved decision making, increased healthcare satisfaction, and optimal health outcomes.

Many clinical researchers are unfamiliar with best practices to effectively engage stakeholders in their research. This course will provided experiential and didactic activities to develop skills for engaging relevant stakeholders.

TARGET AUDIENCE

The short course is designed for investigators, or research team members (including graduate students or research specialists) who have received, or are considering research projects that would benefit from stakeholder engagement.

LEARNING OBJECTIVES

As a result of participation in this short course, attendees will be able to:

1. Discuss changes to consent forms that will increase their appeal and clarity.
2. Discuss strategies to improve recruitment rates and participant diversity, and retain participants through the entire study.
3. List strategies to select and measure high priority outcomes, and reduce missing data.
4. Identify opportunities for productive collaborations with healthcare organizations.
5. Recognize circumstances with the potential to enhance the uptake and real world impact of your research.
6. Describe opportunities to build effective and collaborative research teams.

Upon completion of this short course, attendees can expect to enhance the success of their research proposals, ease the execution of studies, and be better positioned to generate findings that can have real world impact.

**= Planning Committee Member*

COURSE DIRECTOR/S

- * **Elizabeth Cox, MD, PhD**, Associate Professor, Department of Pediatrics; Program of Research on Outcomes for Kids
- * **Nasia Safdar, MD, PhD**, Associate Professor, Department of Medicine; Associate Chief of Staff for Research, William S. Middleton Veterans Administration Medical Center; VA Hospital Research Program

PRESENTERS, MODERATORS & PLANNERS

- * **Nicole Brys, MPH**, Researcher, VA Hospital Research Program
- * **Betty Chewning, PhD**, Professor and Apple Distinguished Chair, School of Pharmacy
- Nichelle Cobb, PhD**, Director, UW Health Sciences Institutional Review Boards (HS IRBs)
- * **Sarah Davis, JD, MPA**, Clinical Associate Professor, Law School and MPH Program; Center for Patient Partnerships
- * **Sarah Esmond, MS**, Director, Administration, UW Institute for Clinical and Translational Research; PCORI Greater Plains Collaborative
- * **Betty Kaiser, PhD, RN**, Director of Stakeholder Training, Wisconsin Network for Research Support
- * **Nancy Pandhi, MD, MPH, PhD**, Assistant Professor, Department of Family Medicine and Community Health; Health Experiences Research Network (HERN)
- * **Ann Sexton, MPH, CCRA**, Recruitment Specialist, UW Institute for Clinical and Translational Research; AsthmaNet
- Maureen Smith, MD, PhD, MPH**, Director, UW Institute for Clinical and Translational Research Community-Academic Partnerships (ICTR-CAP)
- * **Gay Thomas, MA**, Director of Stakeholder Engagement, Wisconsin Network for Research Support
- * **Thuy Dan Tran, BS**, Research Specialist, Department of Pediatrics; Program of Research on Outcomes for Kids

AGENDA

Tuesday, June 5, 2018 (Day 1)

PM

12:00 **Registration and Lunch** (*HSLC Atrium*)

1:00 **Welcome to Day 1**

Elizabeth Cox, MD, PhD, Nasia Safdar, MD, PhD, & Maureen Smith, MD, PhD, MPH

1:20 **Stakeholder Engagement Win-Win: Better Research, Better Lives**

Chris Crnich, MD, PhD, Nasia Safdar, MD, PhD, & Aleksandra Zgierska, MD, PhD, FABFM, DFASAM

1:50 **Break**

2:00 **Developing Productive Research Collaborations with Health Care Organizations**

Nancy Pandhi, MD, MPH, PhD & Sarah Davis, JD, MPA

By the end of this session learners will be able to:

- Determine which stakeholders can influence participation decisions and intervention success
- Identify and troubleshoot potential barriers to successful implementation across the project timeline

2:50 **Break**

3:00 **The Insider Panel: Healthcare System Stakeholders' Perspective on Research Collaboration**

Invited Panelists: Sandra Kamnetz, MD, Stacey Novogoratz, BA, Tammy Quall, MS, MSW, Lisa Sampson, MBA & Moderators: Nancy Pandhi, MD, MPH, PhD, Sarah Davis, JD, MPA

By the end of this session learners will be able to:

- Identify efficient and effective ways to reach potential health system partners

3:55 **Afternoon Closing Statements**

Elizabeth Cox, MD, PhD & Nasia Safdar, MD, PhD

4:00 **Light Dinner**

Continue the conversation and connect with colleagues! Enjoy complimentary appetizers and refreshments.

Wednesday, June 6, 2018 (Day 2)

AM

8:00 **Breakfast** (*HSLC Atrium*)

9:00 **Welcome to Day 2**

Elizabeth Cox, MD, PhD & Nasia Safdar, MD, PhD

9:10 **Engaging Patient Advisors to Improve Research Recruitment, Retention, and Outcomes: Who, Why, and How?**

Betty Kaiser, PhD, RN & Gay Thomas, MA

By the end of this session learners will be able to:

- Discuss strategies for finding patient advisors
- Discuss key strategies to improve study recruitment rates and participant diversity
- Describe impact of patient advisor input on research materials and processes
- Discuss purpose and desired outcomes of orientation for patient advisors
- Recognize elements of effective planning for meetings with patient advisors
- Describe key strategies to sustain engagement of patient advisors and retain participants across project lifespan

11:55 **Lunch** (*HSLC Atrium*)

PM

12:45 **Including the Veteran's Voice in Research**
Nasia Safdar, MD, PhD, Nicole Brys, MPH, & Torrey Tiedmann

By the end of this session learners will be able to:

- Have an understanding of VA funding opportunities and procedures for including VA patients in their studies
- Be able to identify special considerations for engaging Veterans as stakeholders in research

1:45 **Break**

2:00 **"How to Pitch a Study: Tips and Concerns" Panel Discussion**
Invited Panelists: Nichelle Cobb, PhD, Susan Hjelsand, Joann Pritchett, PhD & Moderator: Betty Chewning, PhD

By the end of this session learners will be able to:

- Improve recruitment rates and retention of control subjects
- Appreciate study concerns of people from underserved communities and IRB concerns re: "the pitch"

2:40 **Intersection of Stakeholder Activities with Human Subjects Research Regulations**
Nichelle Cobb, PhD

By the end of this session learners will be able to:

- Assess whether IRB approval is needed for stakeholder engagement activities

3:15 **Break**

3:30 **Breakout sessions.** Please choose one of the following:

1. Expert Consultations on Engagement Approaches

Elizabeth Cox MD, PhD, Betty Chewning, PhD, & expert consults Christie Bartels, MD, MS, Jane Mahoney, MD, Edmond Ramly, PhD

By the end of this session learners will be able to:

- Submit your research project to receive consultation about how stakeholder engagement could enhance your research from experts with successful, real world engagement experience
- Or, for those not submitting a project, learn through discussion and observations of those expert consultations

2. Planning and Facilitating Stakeholder Meetings

Betty Kaiser, PhD, RN & Gay Thomas, MA

By the end of this session learners will be able to:

- Recognize elements of a stakeholder meeting that engage participants and yield constructive feedback for the research team
- Discuss meeting facilitation strategies and problem-solving

3. Recruiting Veterans as Stakeholders for Your Research

Nasia Safdar, MD, PhD & Nicole Brys, MPH, & Torrey Tiedmann

By the end of this session learners will be able to:

- Be able to effectively recruit Veterans with relevant experiences as stakeholders.
- Be able to develop an effective and realistic Veteran engagement plan

4:15 **Closing Statements**

Elizabeth Cox MD PhD & Nasia Safdar, MD PhD

CREDITS

ACCREDITATION STATEMENT



JOINTLY ACCREDITED PROVIDER™
INTERPROFESSIONAL CONTINUING EDUCATION

In support of improving patient care, the University of Wisconsin–Madison ICEP is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC) to provide continuing education for the healthcare team.

CREDIT DESIGNATION STATEMENTS

ACCREDITATION COUNCIL FOR PHARMACY EDUCATION (ACPE)

A total of 7.75 hours of knowledge-based CE credit can be earned by successfully completing this live activity. Pharmacists should claim only the credit commensurate with the extent of their participation in the activity. CE credit information, based on verification of live attendance and completion of the program assessment and evaluation, will be provided to NABP within 60 days after the activity completion.

Universal Activity Number (UAN) JA0000358-0000-18-019-L04-P, 7.75 hours (0.775 CEUs)

AMERICAN MEDICAL ASSOCIATION (AMA)

The University of Wisconsin–Madison ICEP designates this live activity for a maximum of 7.75 *AMA PRA Category 1 Credits™*. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

AMERICAN NURSES CREDENTIALING CENTER (ANCC) & IOWA BOARD OF NURSING

The University of Wisconsin–Madison ICEP designates this live activity for a maximum of 7.75 ANCC contact hours and Iowa Board of Nursing contact hours. The University of Wisconsin–Madison School of Nursing is Iowa Board of Nursing provider 350.

CONTINUING EDUCATION UNITS

The University of Wisconsin–Madison ICEP, as a member of the University Professional & Continuing Education Association (UPCEA), authorizes this program for .775 continuing education units (CEUs) or 7.75 hours.

POLICY ON DISCLOSURE

It is the policy of the University of Wisconsin–Madison ICEP, that the faculty, authors, planners, and other persons who may influence content of this CE activity disclose all relevant financial relationships with commercial interests in order to allow CE staff to identify and resolve any potential conflicts of interest. Faculty must also disclose any planned discussion of unlabeled/unapproved uses of drugs or devices during their presentation(s). Detailed disclosures will be available prior to the start of the activity.

Date: June 5, 2018, 12PM-5PM - June 6, 2018, 8AM-4:30PM

Place: Health Sciences Learning Center (HSLC)
750 Highland Ave
Madison, WI 53726

Phone: (608) 263-4900

REGISTRATION INFORMATION

- Visit <https://ce.icep.wisc.edu/Engaging-Short-Course>
- Select the Register/Enroll Tab
- Select login or register and follow the instructions for UW-Madison NetID log in or Visitor account creation/log in
- Follow any prompts to complete or update your profile information
- Click the Register tab and select your Fee Category/Eligible Discount and “Add to Cart”
- Select “Checkout” and follow the prompts to pay for the short course.

Contact help@icep.wisc.edu if you need assistance

REGISTRATION DEADLINE: June 1, 2018

SHORT COURSE FEES

\$50 Individual Rate

\$100 Team Rate (up to 4 team members)

The short course fee includes the cost of tuition, materials, and meals.

CANCELLATION AND REFUND POLICY

Requests for cancellation must be submitted in writing to help@icep.wisc.edu. Cancellation requests received at least 96 hours prior to the conference will allow a full refund except for the \$10 nonrefundable processing fee. No refunds will be made for cancellations received less than 96 hours prior to the activity start date. If you have registered with your team, the registration is transferable to other team members.

QUESTIONS ABOUT REGISTRATION

Email help@icep.wisc.edu or call 608-262-7226

SHORT COURSE ATTIRE

Casual attire is appropriate for this conference. Since meeting room temperatures and personal comfort levels vary, it is recommended that you bring a sweater or jacket to the educational activity.

PROGRAM CHANGES

Emergency situations occasionally occur and may necessitate topic or speaker changes. The University of Wisconsin School of Medicine and Public Health and the University of Wisconsin–Madison ICEP reserve the right to alter or substitute a topic or speaker without prior notification.

SYLLABUS & CONFERENCE MATERIALS

Short course materials will be available to registered participants 48 hours prior to the event at the short course site. Additional info may be asked from registered participants before the short course: <https://ce.icep.wisc.edu/Engaging-Short-Course>

FOR FURTHER INFORMATION

For short course information or details regarding the short course, please contact Thuy Dan Tran at tran4@wisc.edu.