



Session Objectives

- By the end of this session, learners will be able to:
 - Effectively recruit Veterans with relevant experiences as stakeholders
 - Develop an effective and realistic Veteran engagement plan

Acknowledgement

Material adapted from training series, "Forming and Sustaining Multi-Stakeholder Panels," conducted by the Wisconsin Surgical Outcome Research program in 2016. Video of the trainings is archived on the SMPH Video Library: <https://videos.med.wisc.edu/events/232>.

DEPARTMENT OF SURGERY
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SCHOOL OF MEDICINE AND PUBLIC HEALTH

Introductions 

- Name
- Affiliation
- Position
- Research focus
- Any past experiences working with Veterans
 - Patients
 - Study participants
 - Stakeholders
 - Other relevant professional/personal experiences
- Why you were interested in this breakout topic

Engagement Planning Activity 

- We will break into 4 groups of 5-6 people to plan a hypothetical research project that involves Veteran engagement
- Choose one person to report back to full group
- 3 sets of discussion questions (handout)
- For each set of questions, we will discuss in small groups for 5 minutes, then come together to discuss as a full group

Engagement Planning Activity 

- Choose topic for your hypothetical research project
- Can choose topic that you already have experience studying or just something that is of interest to group
 - VA fact sheets provided to help stimulate ideas


Initial Planning

Initial Planning 

- Who should be engaged?
 - Include those who affect or are affected by the topic and/or outcome(s) of the project
 - Think about characteristics of stakeholders that will promote effective engagement
- When will you engage your stakeholders?
 - Engagement can (should?) happen throughout all stages of a research project:
 - Planning the study
 - Conducting the study
 - Disseminating study results
- How will you engage your stakeholders?
 - Level of engagement (degree of input and involvement)
 - Mode of engagement (in-person, virtual, or a combination)
 - Model of engagement (ongoing advisory board or more informal, as-needed model)

Potentially Helpful Attributes 

- Knowledge of Veterans Health Administration
- Has personal or caregiving experience with health condition being studied
- Motivated to improve health care services and find solutions
- Strong communication and listening skill
- Able to represent more than just their own experience
- Experience on other kinds of advisory boards
- Knowledge of research processes and its limitations in terms of meeting individual needs
- Commitment to the topic or project

Veteran Recruitment Strategies



- Reach out to people who work with Veterans
- Use snowball sampling
- Post or distribute flyers
- Place an advertisement on a local radio station
- Go to events where Veterans will be present
- Advertise on the Facebook pages or in the newsletters of local Veteran organizations
- Reach out to organizations that serve Veterans

Possible Recruitment Venues



- VA Medical Centers
 - Patient-Centered Care Committee
 - County Veterans Service Officers (CVSO) Committee
 - Patient and Family Education Resource Center (PERC)
 - Million Veterans Program
- Veterans Service Organizations
 - Veterans of Foreign Wars (VFW)
 - American Legion
- Vet Centers
- Campus Veteran Centers
 - UW VETS
- Non-Profit Organizations
 - Dryhooch
 - Pets for Vets

Engagement Throughout Your Project



- Planning the Study
 - Topic solicitation and prioritization
 - Develop the research question
 - Selection of comparators and outcomes
 - Creation of a conceptual framework
 - Develop the analysis plan or grant proposal
- Conducting the Study
 - Recruitment and retention
 - Data collection and analysis
 - Review and interpret results
- Disseminating Study Results

Roles and Responsibilities 

- Make sure stakeholders understand the purpose of the research and rationale for involving them
- Approach with a “help us help you” mentality
- Define roles and responsibilities collaboratively
- Roles should be well-defined, reasonable, and flexible
- Important to define:
 - Decision-making authority
 - Communication expectations
 - Time-commitment
 - Responsibilities (requirements related to meeting attendance and participation)

Greenberg, C. Schumacher, J. Brys, N. Stakeholder-Driven Research: Frameworks, Definitions, & Developing an Integrated Stakeholder Engagement Plan. <https://videos.mad.wisc.edu/videos/6504/>. Published January 26, 2016. Accessed June 4, 2018.
Hoffman A, Montgomery R, Aubry W, Tunis SR. How best to engage patients, doctors, and other stakeholders in designing comparative effectiveness studies. Health Aff (Millwood). 2010 Oct;29(10):1834-41.

Discussion 2 – Roles and Responsibilities 

- How will the Veterans influence your study? What parts of the project will Veterans NOT be able to influence?
- What will the time commitment be for stakeholders? (frequency and duration)
- How frequently will you be in contact with stakeholders?
- What is the research team’s role in supporting the engagement process?

Promoting Effective Engagement 

- Meeting venues and modes of communication are accessible
- Compensation - should be commensurate with role in project, skills, and capabilities
- Provide training
 - For Veterans – background information, acronyms, and important terminology
 - For research team – engagement process, military culture, VA Services
- Skilled, neutral facilitator who can manage group processes

Discussion 3 – Ensuring Effective Engagement 

- What training will you need to provide to Veterans in order for them to be engaged effectively? What training will your research team need to engage Veterans effectively?
- What skills and knowledge will it be important for the meeting facilitator to possess?
- What barriers to engagement might your Veteran stakeholder encounter? How will you address these barriers?
- How will you create a safe space for engagement?

Writing the Engagement Plan 

- Make sure to clearly describe stakeholder involvement through all stages of study
 - Planning study
 - Conducting study
 - Disseminating results
- Provide letters of support from stakeholders that articulate their roles

Greenberg, C, Schumacher, J, Brys, N. Stakeholder-Driven Research: Frameworks, Definitions, & Developing an Integrated Stakeholder Engagement Plan. <https://videos.med.wisc.edu/videos/65047/>. Published January 26, 2016. Accessed June 4, 2018

Engagement Rubric for Applicants. Patient-Centered Outcomes Research Institute. <http://www.pcori.org/sites/default/files/Engagement-Rubric.pdf>. Published February 4, 2014. Updated October 13, 2015. Accessed January 25, 2016.

Developing the Budget 

- Compensation – stipend, hourly, etc
- Travel for team
- Travel for stakeholders – parking, etc
- Food and beverage can have constraints
- Professional facilitator
- Transcription costs

Greenberg, C, Schumacher, J, Brys, N. Stakeholder-Driven Research: Frameworks, Definitions, & Developing an Integrated Stakeholder Engagement Plan. <https://videos.med.wisc.edu/videos/65047/>. Published January 26, 2016. Accessed June 4, 2018

Points to Emphasize in Grant



- Stakeholder compensation, including rationale
- Training opportunities for stakeholders and researchers
- How stakeholder barriers to participation will be reduced or eliminated
- Roles and decision-making authority of all stakeholder research partners

Greenberg, C. Schumacher, J. Brys, N. Stakeholder-Driven Research: Frameworks, Definitions, & Developing an Integrated Stakeholder Engagement Plan. <https://videocast.med.wisc.edu/videos/5502/>. Published January 26, 2016. Accessed June 4, 2018.
PCORI Broad PFA Training. Patient-Centered Outcomes Research Institute. <http://training.pcori.org/broadpfaapplicationtrainingcycle32015/>. Published October 29, 2013. Updated January 20, 2016. Accessed January 25, 2016.

Closing questions (full group)



- What struck you during your discussion today in this breakout session?
- What are the main takeaways are you leaving with from this course?

Evaluation Link



Please complete the evaluation for this breakout. An email containing the evaluation link has been sent to you.

<https://go.wisc.edu/sn2n35>
