



## ***OVERVIEW:***

### ***Welcome to The SERVE Toolkit for Veteran Engagement***

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The purpose of the **Strengthening Excellence in Research through Veteran Engagement (SERVE)** Toolkit is to support VA Research Centers and investigators in efforts to include Veterans and other stakeholders in the development, implementation, and dissemination of research studies. The Toolkit was developed through a collaborative process that included representatives from 7 VA hospitals where Veteran Engagement in Research is an established priority.

Our team-based approach was to learn about the range of successful practices that are currently in place across the VA system, to synthesize these practices and identify common themes or approaches, and then to organize the practices into stages for developing Veteran Engagement opportunities at a research center. ***The Toolkit provides specific guidance on the development of group-level engagement strategies with VA research centers as a primary audience.*** However, much of the information presented is relevant for other approaches to engagement, such as one-on-one consultation and for individual investigators seeking to involve Veterans in specific research studies.

## Goal and Organization of the Toolkit

The goal of this first iteration of The SERVE Toolkit is to provide guidance to VA Research Centers and investigators to support the development opportunities for Veterans to be engaged in the research that we conduct. There are many approaches to engaging Veterans. This Toolkit primarily focuses on the development of Veteran Engagement Groups (hereafter called *Engagement Groups*), which entails bringing together or leveraging existing groups of Veterans and other stakeholders to provide input or consultation on all phases of a research study. The Toolkit is organized by phase of development, beginning with **PLANNING** and then moving along the stages of implementation to **CONVENING**, **WORKING**, **EVALUATING**, and finally to **EVOLVING**. Additionally, there is a section of **RESOURCES** that contains sample documents, cyberseminar links, webpages, and other materials, and also a list of publications that may be useful. Each section can be accessed by clicking on the corresponding box below.

The Toolkit is designed so that you can access information relevant for the phase of implementation you may be in at any given point in time. There is no prescribed way to use this Toolkit. Within each phase, we provide an overview of activities that are important to consider along with case examples and supporting documents. The example documents that are available in the **RESOURCES** section of the Toolkit have been made available to you by your VA colleagues who believe strongly in the value of sharing knowledge and avoiding duplication of work.



### 0.1 What Do We Mean by Veteran Engagement in Research?

In this Toolkit we strive to provide guidance for *meaningful engagement* of Veterans and other stakeholders in our research processes. This means the development of bi-directional relationships between Veterans, stakeholders, and researchers “that results in informed decision-making about the selection, conduct, and use of research” (Concannon,

2012). There is a spectrum of engagement in research that varies in both purpose and intensity. Table 1 provides an overview of this spectrum.

Table 1: Levels of Engagement in Research					
	Participate	Consult	Involve	Collaborate	Lead/ Co-Lead
Veteran's Role	To act as a participant in a research study	To provide feedback or input on specific research activities	To work directly with a research team throughout a study	Partner with researchers on all aspects of a research study	Leadership role with decision-making authority on studies
Researcher's Role	To conduct research in a respectful, ethical manner	Veteran(s) asked for input on specific aspects of a research study	On-going engagement of Veteran(s) throughout a research study	Veteran(s) join research team and act as team member	Shared leadership and decision-making
Examples	Quantitative, qualitative, mixed methods research	Meeting with existing or ad hoc groups; priority setting activities	Standing group dedicated to providing input on studies	Members of research steering committee	Veterans are research partners or co-investigators

*Levels of engagement in health research figure was adapted from the International Association for Public Participation's Public Participation Spectrum under the fair dealing provision of the Canadian Copyright Act for research.*  
<https://sustainingcommunity.wordpress.com/2017/02/14/spectrum-of-public-participation/>

It is important to note that this Toolkit focuses primarily on the creation of opportunities that fall in the middle of this spectrum: **Consult, Involve, and Collaborate**. We view the Participate level of engagement as the usual way that Veterans are involved in our research. While this is important, our hope is that this Toolkit helps move us beyond

seeing Veterans as solely participants in research. On the other end of the spectrum is the Lead/Co-Lead type of engagement which may be an approach

to strive for, but may be challenging to pursue given VA rules and regulations. Therefore, we have focused the Toolkit guidance on these middle categories.

“Giving Veterans a Voice is important. Because sometimes Veterans feel like a number in a machine. But getting Veterans’ perspectives make you feel like you have a voice.”

-Veteran Engagement Group Member

## 0.2 Why is Veteran Engagement in Research Important?

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Engaging Veterans and Veteran Stakeholders in the development, implementation, and analysis of VA research may help to:

- **Strengthen our understanding** of our data and the population(s) we hope to help
- Ensure we ask useful, **meaningful research** questions that can improve VA health services and the care provided
- **Improve the quality and relevance** of data collection instruments
- **Speed dissemination and uptake of innovations** to Veterans and those who care for them

Several cyberseminars are available that provide both an overview and specific details about Veteran Engagement. A list is provided [here](#).

“I think there’s no ways that it’s [engagement of Veterans] inappropriate. I think there’s only ways that it’s absolutely appropriate.”

-HSR&D Investigator

## 0.3 How is Veteran Engagement in Research Aligned with VA Priorities?

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In the Veterans Health Administration (VA), MyVA and the concepts of Veteran Engagement and patient-centered care have been key drivers in efforts to redesign health care. MyVA places the Veteran at the center of everything we, as VA employees, do. Obtaining and including Veterans’ perspectives on health care and services have become a key focus area. In recent years, VA Health Services Research & Development (HSR&D) has increasingly emphasized engaging Veterans as partners in research. Veteran Engagement in research can help foster a community and provides opportunities to connect with those whom we are serving. It is a critical opportunity to connect in

“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,” (from PCORI.org: <https://www.pcori.org/engagement/what-we-mean-engagement>). This engagement is important as it influences healthcare research to be relevant and useful from patient perspectives, establishes trust, creates a sense of legitimacy with regard to the research findings, and encourages the uptake of research findings.

“Part of the experience of talking to the veteran group is you become aware of how much we say that doesn’t make sense to anybody outside of research.”

*-HSR&D Investigator*

#### 0.4 Veteran Engagement is Challenging, and You Are Not Alone

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Our original goal with the development of this Toolkit was to synthesize “best practices” for engaging Veterans in research. What we found during the development process is that there are a range of successful practices that have been used across VA. This is not surprising given the diversity of our healthcare system. In this first iteration our goal is to share what we have learned from our own experiences and the experiences of others who are engaged in this work. This Toolkit does not address everything. We have included information that has been requested and that we identified as commonly needed for Centers and individuals interested in Veteran Engagement activities. We hope that the Toolkit makes it possible for others to engage in these efforts and contribute to our collective learning on how to cultivate the meaningful engagement of Veterans in our research.