



Strengthening Excellence in Research through Veteran Engagement

SERVE Co-Leads:

Justeen Hyde, PhD and Sarah Ono, PhD



Disclaimer

The views expressed in this presentation are those of the authors and do not necessarily reflect the position or policy of the Department of Veterans Affairs or the United States government.



Thank you to VHA HSR&D
Project #SIP 17-152

Poll Question #1

Have you heard about SERVE? (select all that apply)

- Yes, I keep up on everything they are doing.
- Yes, I have used consultation services for VE.
- Yes, but not exactly sure its purpose.
- No, I was just curious about this cyber.

What is SERVE?

Strengthening Excellence in Research through Veteran Engagement (SERVE) is a multi-site project that aims to synthesize information about successful practices across VA to engage Veterans as consultants to our research.

Why Engage Veterans in Research?

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

The SERVE Team

Bedford/Boston:	Justeen Hyde (co-lead), Gemmae Fix, Anna Barker
Denver:	Leah Wendleton & Kelty Fehling
Durham:	Jennifer Gierisch & Brandolyn White
Los Angeles:	Alison Hamilton
Milwaukee:	Jeff Whittle & Kristyn Ertl
New Orleans:	Gala True
Portland:	Sarah Ono (co-lead)

Poll Question #2

Do you currently have opportunities as a researcher or research center to engage Veterans or Veteran stakeholders in all stages of a research study?

- Yes
- No
- Not yet, but working on it
- I don't know or not relevant to my position

Poll Question #3

Which of the following best describes **your** experience with engaging Veterans as consultants in the research process?

- Low; tell me everything
- Somewhat familiar; want to learn more
- Actively engaged; we have an approach up and running

Same Poll from September 2017

QUICKPOLL

Which of the following best describes your experience with engaging Veterans as consultants in the research process?

Poll Results (single answer required):



Play 0:04:34

1:00:43



Purpose of Today's Talk

- Veteran Engagement Toolkit
 - Purpose
 - Overview of how it is organized
 - Example material
 - Timeline of release
- Reflections on what we have learned
- Resources for continued engagement

Our Approach

- Environmental scan (May, 2017)
- Review of existing qualitative data about engaging Veterans in research
- Focused conversations with members of 3 existing Veteran Engagement groups
- Review of materials created by VA research centers supporting Veteran Engagement
- Collaborative development of material for toolkit

Goal of the SERVE Toolkit

- To **provide guidance** to VA researchers interested in engaging Veterans as consultants to their research
- Highlight range of successful approaches, practices, and materials developed to create ***Veteran Engagement Groups***
 - By ***Veteran Engagement Groups*** we mean Veterans and/or Veteran Stakeholders selected to meet on a regular or ad hoc basis to provide input on the design, implementation, and dissemination of research

What Do We Mean By Engagement?

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)



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	Research teams expanded to include Veterans; provide training as needed	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	Veteran(s) join research team and act as team member	Veterans are research partners or co-investigators

Organization of the Toolkit

PLANNING

Defining purpose, setting goals, developing strategies and resources to launch your engagement efforts

CONVENING

Recruiting, training, meeting, moving the ideas into practice

WORKING

Organizing collaborative meetings, communicating with participants, adapting to needs

EVOLVING

Identifying new opportunities, facing challenges with increasing complexity

EVALUATING

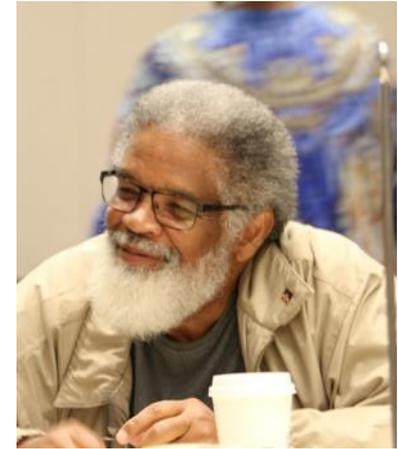
Reflecting on engagement practices, continuous quality improvement, understanding impacts

RESOURCES

Selected Literature
Cyberseminars
Sample Documents Supporting VE
Links to Other Patient Engagement Resources

Planning

- How do you get started?
 - Champions to lead the effort
 - Steering Committee
- What is the planning work?
 - Developing a vision
 - Work plan
 - Timeline
- How do we make decisions?



Planning

THE TOOLKIT offers examples and suggestions at various “altitudes”

Overview of Action Steps:

- 1) Form a Veteran Engagement steering committee to develop the initiative
- 2) Explore why you want to create opportunities for engaging Veterans in research
- 3) Reviewing and select a model(s) of engagement that match these interests and needs
- 4) Form subcommittees (or designate persons responsible) to identify the organizational structure and resources needed to support that model, assess feasibility, and develop guidance/recommendations to move the work forward
- 5) Share with others and gain buy-in

Identify champion(s): One of the first important decisions to make is who will champion and spearhead the development of your Center’s Veteran Engagement effort.

Several successful sites across VA have a co-leadership model.

These could include: *Faculty/Investigator + Program Manager*
Faculty/Investigator + Program Assistant
Program Manager + Program Assistant



Recommend protected time not collateral duty



Planning

1.8.2 *What mechanisms for compensating individuals have been used across VA?*

Compensating individuals who are involved in research can be a moving target and this is among the sections that will likely need updating from time to time as regulations change. These are what were determined to be a range of reasonable options that have worked for at least one VA health care system. We offer more than one since not every mode of compensation will work in all places.

Note: Frequency of compensation is decided at the site-level. The range is from monthly to annually.

- a. **Gift Card Compensation (VA funds).** This has been done using VA research funds. Gift cards are purchased through an approved vendor with an existing VA contract. In the case of Portland, the gift cards are to a large, regional “one-stop-shopping” merchant where a wide range of products are available. Using this approach requires advanced planning as the time involved in contracted purchases can often take several weeks.
- b. **Gift Card Compensation (non-VA funds).** In locations where there is a research foundation available to investigators, it may be possible to purchase gift cards as compensation for engagement activities using non-VA funds. This process will be specific to your local foundation and requires that there are funds available to be used of this purpose.
- c. **Direct Deposit into Participant Account with Research Vouchers (VA funds).** Some research centers work with their Administrative Officers to set up a Purchase Order (PO) used to compensate Veterans annually. Veterans must fill out necessary forms to set up direct deposits (FMS Vendor File Request Form 10091, Direct Deposit Form). Similar to vouchers issued for research participation, vouchers are issued for research engagement compensation with payment deposited directly in to bank accounts.
- d. **Cash Vouchers (VA funds).** Research Centers can open a line of accounting with their fiscal department and obtain pre-approved cash vouchers. Whenever a Veteran consultant contributes time to a research project or Center, a designated person at the Center fills out a cash voucher that can be taken to the hospital’s agent cashier to exchange for cash.
- e. **Issuing Checks (VA funds).** There is also an option to have a check mailed to the individual, but this can take 2-3 weeks for receipt. This is a mode of compensation used for research participants in general (in some health care systems). It requires the completion of the [VA 10-7078 form: Authorization and Invoice for Medical and Hospital Services](#).
- f. **Non-monetary Compensation.** In lieu of cash or a cash equivalent, some locations have opted to provide a meal voucher at the local canteen on the day of meetings. Possibilities for compensation through local facility services can be determined on a case by case basis.

Convening

- How do you recruit Veterans to get involved?
- What training might Veterans need to feel comfortable providing input?
- What training might research teams need to feel comfortable asking for input?
- How can we assure a good start?



Convening

We are currently seeking Veterans to serve on the

Community Engagement Committee

The CEC helps VA researchers design and implement studies to improve the delivery of VA healthcare

- Are you or do you know a Veteran who has:**
- A desire to help other Veterans?**
 - An interest in research?**
 - Good communication skills?**
 - A willingness to share healthcare experiences?**

Committee service includes:

- Committing to a one-year term
- Attending six in-person meetings at the Michael E. DeBakey VAMC
- Compensation for attendance
- Lunch will be provided

For more info, contact

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COIN MIRECC Veteran Research Engagement Board
Statement of Interest
Denver VAMC

Name: _____ Date: _____

Why are you interested in serving on the Veteran Research Engagement Board?

What unique skills would you bring to the Veteran Research Engagement Board?

Veteran Research Engagement Board Rules of Operation



*This document was created by members of the Veteran Research Engagement Board

MISSION STATEMENT

In order to promote Veteran community engagement, patient-centered research and translation of Veteran Health Administration research findings in practice and community settings, this Board will work in partnership with, and provide recommendations to researchers (Center Of Innovation and Mental Illness Research, Education, Clinical Center as an example) throughout the research process, from topic generation to dissemination and implementation of results.

Working Together

- Preparing for Veteran Engagement meetings
- Meeting facilitation and other organizational strategies
- Closing the feedback loop
- Keeping members engaged



Working Together

May 2016 VEG Checklist:

Pre-Meeting Prep:

- Meeting reminder to Investigator & team (includes one month and two week deadlines for meeting materials for review)
- Review meeting materials with Sarah Ono and suggest appropriate changes for Veteran relevance
- Create Agenda (get input from VEG, Ono & Investigators)
- Email Agenda and Meeting Materials the Friday before the meeting occurs

Day Before Meeting Prep:

- Contact Info Sheet Review (Print)
- Charge Recorders (2)
- Print copies of agenda and meeting materials
- Buy food, keep receipt and send PVARF reimbursement documents

Day of Meeting Prep:

- Arrive an hour early
- Get key from ben's desk and set up refreshment
- Lay meeting materials out on desk for VEG members

- Set up Powerpoint and clicker for the Investigator (if needed)
- Greet Veterans as they come in
- Make July meeting Reminder

Meeting Responsibilities:

- Make introductions/facilitate the meeting
- Ask permission to record & turn on recorders
- Take notes
- Pass out gift cards & collect signatures
- Pass out meeting folders with materials
- Pass out evaluations at end of meeting & collect responses

Post-Meeting Responsibilities:

- Email VANTS line folks feedback sheets
- Gift card log (Scan)
- Upload process field notes to diary
- Upload feedback sheets to folder
- Compile feedback sheet and PDF to Investigator and team
- Meeting Notes ASAP
- Thank you email to VEG
- Meeting Notes ASAP

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- Compile feedback
- Investigator and tea
- Meeting Notes A
- Thank you email
- Meeting Notes A

What Do You Think? (also known as "a sticky note exercise")

Goal: To generate ideas about areas of importance to Veteran's health and well-being that can inform CHOIR's research efforts.

The Mission: Over the next 25 minutes, you will work independently, with a partner, and then with a small group to brainstorm and organize as many ideas as possible.

The Question:

(Option 1) Think about the Veterans you know and work with every day. What do you see as the most pressing issues or needs that impact their health and well-being?

(Option 2) The mission of CHOIR is to improve Veterans' health by developing and implementing studies that help us understand factors influencing Veterans' health and how to best address these factors. Based on your personal and professional experience, what are the factors we should be focusing on right now?

(Option 3) What do you think are the biggest barriers to accessing and staying engaged in health and mental health care for Veterans?

(Option 4) Others?

The Strategy: You have in front of you a stack of sticky notes.

- 1) Over the next 5 minutes, we want you to write down as many ideas as you can think of in response to the question above. Your goal is to generate at least 20 ideas!
- 2) Your next task will be to find another individual in the room (preferably someone you do not know). Over the next 10 minutes, you will review your ideas. We want you to work together to organize your ideas. For example, put like ideas together. Find a common name to describe these like ideas. Once you found similarities, look at your unique ideas. You can choose to keep them separated or combine them in some way.
- 3) Finally, we will have all groups come up to the board and put their combined sticky notes together. If we have time, we will look at the ideas together and see where there are similarities or overlap across the group.

Looking Forward: We will write up all the ideas presented and share them back with the stakeholder council via email. You may use these ideas in your own work. We will also present them to CHOIR staff for their consideration.

Working Together

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What Do You Think? (also known as "a sticky note exercise")

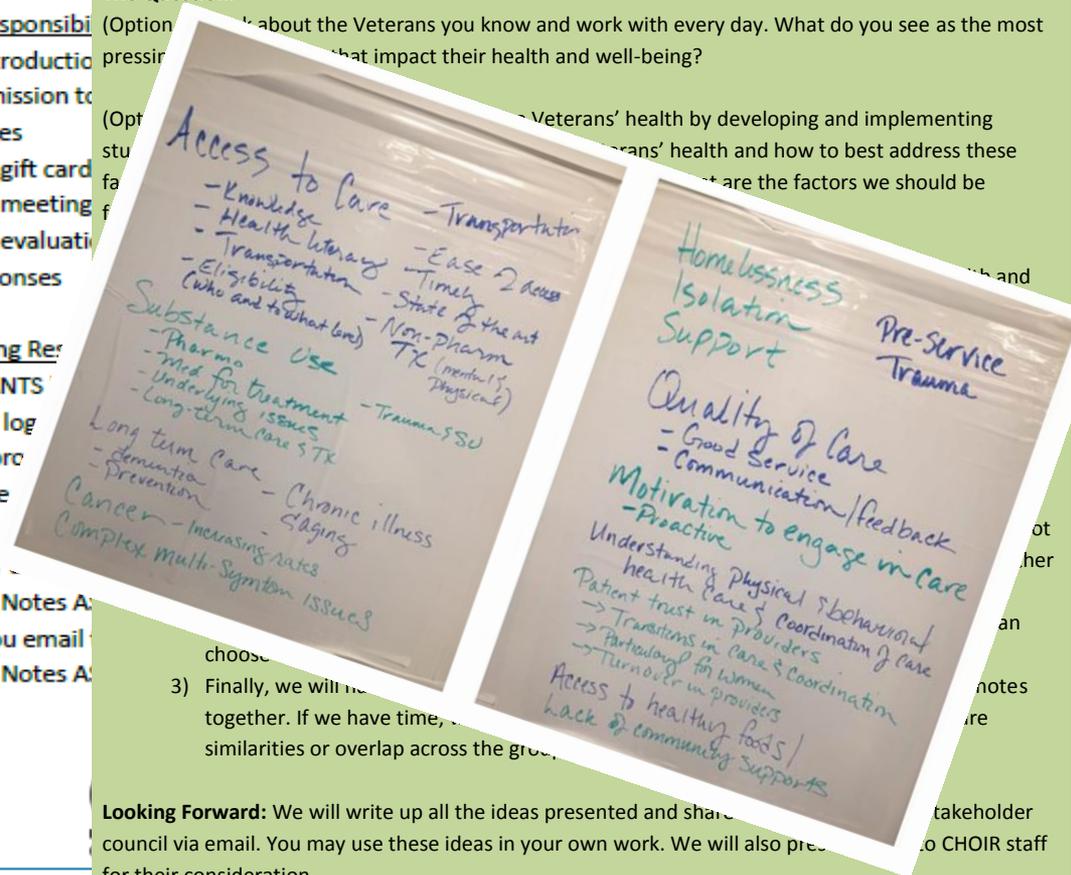
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The Mission: Over the next 25 minutes, you will work independently, with a partner, and then with a small group to brainstorm and organize as many ideas as possible.

The Question:

(Optional) Think about the Veterans you know and work with every day. What do you see as the most pressing issues that impact their health and well-being?

(Optional) How can we improve Veterans' health by developing and implementing programs that address their health and how to best address these issues? What are the factors we should be considering?



Looking Forward: We will write up all the ideas presented and share them with the stakeholder council via email. You may use these ideas in your own work. We will also present them to CHOIR staff for their consideration.

Evolving



- Reflection and continuous quality improvement
- Acknowledging contributions
- Identifying new opportunities for engagement
- Shifting from input to collaboration

Evolving

Research & Development Meetings » 2017 » Streamed_sessions » Veteran Speaker: Richard Barbato

Research & Development



2017 HSR&D/QUERI National Conference

July 18-20, 2017

Hyatt Regency Crystal City

Accelerating **Innovation** and **Implementation** in Health System Science

[| All Streamed Sessions |](#)

Veteran Speaker: Richard Barbato



- Co-presenting research findings
- Authorship on research papers
- Identifying new research questions
- Champions of VA research

Evaluation

Creating the “big vision” Evaluation Plan

What does success look like for us?

Formative Evaluation

What is it that we are doing?
How do our ideas work in practice?
What changes do we need to make?

Process Outcomes

Who is involved?
What recruitment efforts work?
How engaged to participants feel?
What is the level of satisfaction with participation?

Impact Outcomes

What is the value of our efforts?
What improvements or changes have we seen?

Evaluation

Example evaluation tools that you can adapt to get feedback on your Veteran Engagement approach



Feedback Method	Purpose	Example Documents
Survey	<ul style="list-style-type: none"> ▪ May be used to collect Veteran and/or investigator feedback ▪ Standardized ▪ Used at set points in time ▪ Useful for board QI ▪ Useful for quantitative evaluation ▪ May be used in feedback loop 	<ul style="list-style-type: none"> ▪ Tampa CINDRR Member Survey ▪ Denver COIN-MIRECC Member Survey ▪ Denver COIN-MIRECC Pre-Post Member Survey ▪ Portland COIN Member Survey ▪ Portland COIN Investigator Survey ▪ Denver COIN-MIRECC Investigator Follow-up Survey
Focus Group	<ul style="list-style-type: none"> ▪ Useful approach for collecting Veteran feedback ▪ Allows for group comfort and idea sharing ▪ Useful for board QI ▪ Useful for qualitative board evaluation ▪ No set points in time 	<ul style="list-style-type: none"> ▪ May modify Interview guide examples for Focus Group format
One-on-one conversation/ Interview	<ul style="list-style-type: none"> ▪ May be used to collect Veteran and/or investigator feedback ▪ Useful for board QI ▪ Useful for qualitative board evaluation ▪ No set points in time 	<ul style="list-style-type: none"> ▪ Portland COIN Member Interview Guide ▪ Denver COIN-MIRECC Member Interview Guide ▪ Portland COIN Investigator Interview Guide ▪ Denver COIN-MIRECC Investigator Interview Guide

Resources

- Example Documents
 - Mission Statements
 - Governance (Charters, MOUs)
 - Trainings (Veterans, Research Teams)
 - Recruitment Materials
 - Evaluation Instruments
- Cyberseminars related to Veteran Engagement
- Links to a selection of literature related to participatory research & patient engagement

What we have learned

- We have many colleagues across VA who are interested in Veteran Engagement
- There is not a single best practice, but a range of successful practices
- The value of engagement extends beyond improvements in our research studies
- There is no end point to engagement, but ideally continual evolution

Reflection on Toolkit Content

- Strengths
 - Practice-based guidance on how to create opportunities for Veterans to inform your research
 - Case studies and example materials so you don't have to "invent the wheel"
- What we are still learning (and not in toolkit)
 - How to create that culture shift that values the inclusion of different types of expertise in research
 - The "business case" for engagement
 - How to co-lead research with Veterans within the VA

Collaborative Learning

- This phase of work is near complete... but there is so much more to do and learn!
- Continued dialogue and interest from Central Office
 - Contemplating a space on VA Pulse
 - Jam Sessions to dialogue informally with colleagues about engagement challenges
 - April 5th – Evaluating Engagement
 - May 3rd – Evolving your Engagement Initiative
 - Potential to use conferences and Cyberseminars as a way to foster on-going learning and sharing

Poll Question #4

Which of the following questions about Veteran Engagement (VE) are important to explore? (check all that apply)

- What does successful Veteran engagement look like?
- What are the best measures to assess the impacts of Veteran-engaged research?
- What practices are associated with more successful Veteran engagement efforts?
- How does Veteran-engaged research differ from other research?
- How does Veteran-engaged research impact dissemination?

Next Steps

- Launch of website April 1, 2018 (Thank you, CIDER team!)
- We will send you a link when the site is live
- HSR&D Veteran Engagement Workgroup and the JAM Sessions will continue

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