Section 2: Convening

"You have to do the research. ***If you don't know about something, then you ask the right people who do."***
-Spike Lee

One of the most important steps in developing your Veteran Engagement model is deciding who are the right people to invite as consultants and collaborators. Across VA, there are a range of different types of people that have been identified as appropriate for stakeholder groups, including Veterans, care partners, or community-based or VA-based providers. The question of who to invite should be informed by your mission and the focus areas of your Center. Once you decide who to recruit, the next question is how to recruit these individuals. In this section of the Toolkit we provide some ideas that other VA Centers have successfully used to outreach to and recruit Veteran stakeholders to participate in their Veteran Engagement initiative(s). When possible, we have provided example recruitment materials from VA centers that may help inform the development of your own recruitment efforts (see **Resources section**).

Recruitment	Training	Initial Meetings	Reflection on Process

2.1 Recruitment

Recruitment is one of the most common topics of interest when it comes to establishing an Engagement Group. It can be helpful to think about what characteristics would be ideal for your Engagement Group and try to target recruitment as best you can to fit that vision. Diversity takes many forms in the Veteran community. There may be traits specific to the military that need consideration, such as branch of service and rank. Just as you may seek to have men and women involved, you may also decide to consider the representation of rank in your group.

Defining the type of initiative you want will help dictate what actions you pursue for your recruitment. There are different ways an Engagement Group can be set up, from a group that has open meetings for all to attend, to having a structured meeting where the same members regularly attend. Either method will provide opportunities for Veterans to engage with researchers. These opportunities are the critical piece, and there are lots of ways to get there.

It may also be helpful to think about your Engagement Group development in stages, breaking the task down into pieces. Some locations decided to start small, with 2-3 Veterans, and grow from there. In Portland, CIVIC implemented a 'seed committee' to get rapid feedback as the center developed a plan and a process for its Engagement Group, and then the seed committee members helped with outreach and recruitment from the local community.

2.1.2 Who to recruit

You likely started working on recruitment in the planning phase. Who you want to engage depends to a large extent on you mission and purpose. Some commonly considered characteristics that drive recruitment include:

- Era of service (WWII, Korean, Vietnam, Gulf War, OEI/OIF, in-between war periods)
- Branch of service (e.g., Army, Navy, Air Force, Marines, Coast Guard, National Guard)
- Service Rank (e.g., Private, Field or Senior Officers, General, Lieutenant General, Captain
- Gender
- Type of stakeholder other than Veteran (e.g., family members, VA employees, Veteran liaisons, etc.)
- VHA utilization (Veterans enrolled or not enrolled in VHA care)
- Ethnicity
- Education and Professional Backgrounds

2.1.3 Develop a recruitment plan

Develop a recruitment plan that outlines who, what, where and when you will conduct your outreach efforts. Some VA Veteran Engagement leaders have told us that having a recruitment plan demonstrates to those you are recruiting that you are thoughtful and serious about their engagement. Your plan should include the following information:

Who to recruit is discussed above. While you may need some flexibility in your recruitment, it is helpful to have a sense of the diversity of participants you would like to have from the beginning.

How and Where to recruit can take many forms. Many samples are provided through the links in **Section 6 – Recruitment Materials.** Some suggestions are listed below:

- ***Flyers and Posters:*** Most sites have developed recruitment materials ranging from flyers to tri-fold brochures. These are useful to provide to individuals as you meet them in person or to leave in designated areas for people to review if interested.
- ***Presentations:*** considering presenting the idea to local groups within and outside of the hospital (i.e., Research Week Presentation, MyVA groups or Mental Health Councils, VFW, American Legion, etc.).
- ***Recruitment Letters for Providers:*** Connect with Providers and Services in the hospital. Provide them a detailed description on what your center is doing and ask them to pass on your contact information to Veterans who may be looking for these types of opportunities.
- ***Social media:*** If you are looking for a large number of people to take part in an Engagement Group or you do not have specific recruitment criteria, you may consider posting information about the opportunity on approved social media sites, such as Facebook and Twitter.

Point of contact is important to designate so that individuals interested in learning more about the engagement opportunity have a clear sense of who they can contact.

Process for selection is a good practice to ensure those interested understand the commitment and will be a good fit for this type of activity. Some Research Centers have Veterans fill out a Statement of Interest, interview with staff and other Veterans, or both. Additional recommendations setting up a process to select Engagement Board members are provided below.

Training that may be important to prepare Engagement Board members for their role is also important to include in your recruitment plan. This allows you to be able to explain what the orientation and preparation process is when you identify potential members. It also helps prioritize the development or adaptation of training materials.

Additional thoughts for your recruitment plan:

You may find some initial confusion about whether or not this opportunity is a research study. Keep in mind that Engagement Groups for research are still relatively new and may take some explaining – to BOTH Veterans and researchers. Two recommendations include: 1) make sure the people who are recruiting individuals to take part in groups are able to explain what is being asked of them, and 2) be as transparent as possible about what will be involved and how their input will be used. This will help ensure that those who connect with you will have expectations consistent with the work they will be doing.

2.1.4 Selection Process

Applications and Interviews*:* As noted above, a number of Research Centers have a formalized process for selecting individuals to be a part of their Engagement Groups. Some have a two-step process that begins with submission of a statement of interest to participate and/or completion of a brief application. The second step is an interview. The statement of interest or brief application provides you with some initial information about why an individual is interested in research. Sometimes due to staffing, room, or other restraints we are not able to offer everyone an opportunity to participate in the Engagement Group. Some Research Centers have created a rubric to score the interviews or interest forms, which can help make the selection process less subjective (see Recruitment Materials in Resources Section).

Interviews can be conducted in person or by phone. It's important to keep in mind that interviews do not have to be the same as ones you may conduct for a study. We recommend striving for a conversational tone. Having questions identified in advance can be helpful and ensure consistency. Interviews are also an opportunity for prospective Veterans to ask questions and get clarification about what is expected. *Approaching this as a two-way exchange is helpful to everyone involved.*

People conducting interviews should be prepared to provide prospective members with the following information:

- Objectives of the group
- Information on the Research Center
- A summary of the position (role of Veterans on Engagement Groups)

CASE STUDY

When Portland was establishing the CIVIC Veteran Engagement Group, people interested in joining or referred, were asked to share a bit about themselves and write a paragraph about why they were interest in collaborating with researchers. There were also demographic questions and a free text question about health conditions of personal interest (no requirement to disclose PHI). It was a way for us to get a sense of people before a conversation and one investigator pointed out that we'd know someone was a good fit when they turned in a paragraph and returned out calls.

- Examples of duties and responsibilities
- Overview of any training requirements
- Compensation information
- Professional characteristics (e.g., listens well, shares perspective, etc.) you would like someone to have

During these initial conversations you may also spend some time discussing the research process. Research can be a meticulous process and it is important to discuss the role of Engagement Groups in the process and timelines for giving and receiving input on research. It is often a bit of a surprise to people outside of research how long it takes just to get a study developed and funded! Again, these types of practices can also show how important and valuable the Veterans Engagement is to the Research Center.

2.2 Training

Training is an important way to set people up for success. Like most aspects of Veteran Engagement there are numerous paths to take and one is not necessarily better than another. If there is a best practice related to training, it is to keep in mind that you want participants to succeed – to feel confident and comfortable, and to take away something positive from the engagement encounter. This applies to Veterans and stakeholders as well as researchers. Training is important for Veterans so that they have a context for research and feel comfortable talking with researchers and sharing their experiences and perspectives. Training for Veterans also needs to inform them of important principles in research such as privacy and data security. Training for researchers is also important to offer. Researchers may not be comfortable with the idea of getting feedback, or may have questions about what to do with feedback – especially if it is critical. Training or support may also be needed to make sure that information is delivered at a level that is understandable and accessible. Understanding the intent of an Engagement Group helps a presenter prepare for an encounter.

During the Planning phase of your Engagement Group you may have started thinking about the kinds of training that may be useful to offer to Veterans and research members. When you convene your Engagement Group and meet in person, take the time to discuss their training interests and needs. Use this meeting time to assess what is essential for Veteran members to thrive in the engagement process generally or on specific projects. Every Engagement Group is different. Many who have active Engagement Groups have built skills over time to anticipate and address the training needs of Veterans and research staff.

Ideas for training topics include:

- What is Health Services Research? *(for Veterans)*

- Health Services Research & Development (HSR&D) Research at the VA: An overview of policy, grants, programs and timelines *(for Veterans)*
- Military cultural competence *(for Researchers)*
- How to communicate scientific concepts in lay language, shared decision-making, and basic knowledge of military organization and history *(for Researchers)*

Training does not all have to happen at once. Training can be an ongoing group activity. When you run into an area that you don't know about, invite an expert in to provide a training! This toolkit can be used as part of training and there are materials in the **Section 6 –Training** that offer training activities and models to help visualize engagement.

Below we outline examples from the Durham COIN VetREP and the Portland COIN Veteran Engagement Group (VEG). These VE training narratives demonstrate multiple strategies for shared-decision making that have been successful within VA HSR&D.

CASE STUDY:
Two approaches to training

The Durham COIN VetREP (est. in 2016) convened a planning committee (which included two Seed Committee members) to develop and adapt trainings for Engagement Board members. They worked together to adapt three training modules:
Module 1: Research: What, Why and Who
Module 2: Research Ethics: History and Application
Module 3: Understanding the Research Process

VetREP members spent the first six months training with the Center Veteran Engagement lead, Dr. Jennifer Gierisch and the Liaison, Brandolyn White, MPH. The 3 modules provide the foundation to enable the VetREP members to engage with various research studies.

The Durham VetREP annually recruits new members. The VetREP leadership team facilitates the annual training models for inaugural and new members.

The Portland CIVIC VEG (est. in 2015) convened a Seed Committee as part of a plan to implement the CIVIC Veteran Engagement Group (VEG). This group consisted of 4 Veterans, each bringing a different connection to the local Veteran community and 4 researchers. The Seed Committee met 3 times over the course of 5 months.

Two types of training were identified as being important for Veteran members. First, in order to be compensated for their time, Portland COIN VEG members were required to go through the WOC process. As part of this process they were required to complete TMS trainings associated with research and privacy. These could be completed online when it was convenient.

The second kind of training focused on health services research and clinical science. The Seed Committee opted for these trainings to be provided through facilitated conversations with Center VEG leads and through research presentations made by Investigators.

Today, Portland CIVIC Veg is comprised of 8 members who have been relatively consistent since its inception.

2.3 Initial Meetings

In **Section 3: Working Together**, we provide an overview of key ingredients for successful meetings with your Engagement Group. In this section we highlight strategies that are important for those first initial meetings with the group. The goal of these initial meetings is to cultivate a sense of enthusiasm and value of the group and to lay the foundation for a strong working relationship between Engagement Board members and you or your Center and between Engagement Board members themselves. It can be tricky to strike a balance between relationship building and getting through logistical, bureaucratic and/or training requirements. We strongly recommend you prioritize what is most important to set the right foundation.

TIPS:
Two ways to prepare for meetings

After the three module trainings with the **Durham COIN VetREP**, the VE Liaison sends *"Research Questions for VetREP Investigators,* which is filled out in advance of the VetREP meeting. This document provides a foundation to guide the research engagement discussion and meeting materials. It gives individual Investigators the flexibility to engage with Veterans using shared language and to communicate up front what Veterans need.

When the **Portland VEG** liaison prepared for monthly meetings, she asked the Investigators and teams to identify 2-3 key questions that they wanted the VEG to address. This guided feedback and informed the pacing of the meeting to ensure there was time to touch on questions identified. The VEG liaison regularly consulted with research teams about tips for talking to the VEG, (e.g., make eye contact with the group and use accessible language).

Sample meeting:

Pre-Meeting Activities

As people begin to gather, it is important to acknowledge everyone in the room and on the phone. Meetings will often start 5-10 minutes late because of the nature of coordinating a group of people that travel to meetings. VA parking is a notorious challenge at many facilities. Allow for flexibility in the beginning of the meeting and remind folks about the location of rest rooms and availability of snacks and coffee. The use of affirming language for

Veterans and staff can build comradery in the engagement process. This acknowledgement of appreciation for the Veterans' time and attention to detail can build inclusion and group morale. Use preferred names when members enter the room; this will give other people cues that the Engagement Group has a sense of community. Remember to laugh, make eye contact, speak clearly and recognize accomplishments or life changes when appropriate (e.g., a sick relative, a new baby, recent vacation). The first informal ten minutes of a meeting can set the stage for success.

Introductions: Go around and have everyone introduce themselves. It can give you a lot of information, especially what people choose to offer about themselves and which aspects of their identity the foreground. You may also ask individuals to talk about why they were interested in joining the Engagement Group and what they hope to gain for their participation. This creates a shared sense of understanding and mutual reinforcement of goals.

Agenda: This will vary depending on the stage of implementation of your group. In all meetings it is helpful to provide an overview of the meeting agenda and make sure everyone has reference materials when needed. Templates are available in **Section 6.5-Templates for Abstracts, Agendas, and Notes/Minutes**. Information to provide during the initial meeting also includes:

- *(initial meeting)* **How do we work together**: Introduce the Mission Statement or Charter (this is COIN- or project-specific)
- *(initial meeting)* **Frequency of meetings**: use this initial meeting to ask how often the Veteran members want to meet, establish a goal and provide a follow-up email with meeting schedule.
- *(first few meetings and periodically as needed)* **Provide overview of roles, responsibilities, expectations** – reminder of group ground rules

Trainings: Some Research Centers opt to spend the first few meetings making sure that Engagement Board members feel prepared for their role. You can use some or all of your meeting time to provide recommended trainings. While this can provide a quick way of getting through the training recommendations, the potential downside is that members may start off with the impression that their role is to listen and learn rather than provide input. Another option is to provide a mix of training and research presentation/discussion during the initial meetings so that members gain a more immediate sense of what they have signed up for. (See **Section 6.4 – Trainings for Veterans**)

Research presentation / discussion: Over time, most of your agenda will focus on providing input on research studies. Even though there is a lot to cover in the initial and first few meetings, it is nice to have at least one researcher present or share their work. We often learn best by doing, so jump in.

Expectations about next steps: With about 10 minutes left, be sure to remind the group when the next meeting is and make sure you know the best mode to communicate with members. In most cases email works well. If you are incorporating reflection or feedback surveys or activities into your process, make sure you save adequate time to get to these activities.

Compensation for participation: This should be established during ***planning*** (see **Section 1.8**). The Veteran Engagement liaison should pass out or mail compensation at the end of the meeting. If there is a delay in payment, make sure that follow through is timely.

2.4 Reflecting on Process

It is important to remember that establishing an Engagement Group is not an easy task, but once established it becomes rewarding quickly. We have heard from researchers that the encounter with an Engagement Group is often "surprising" or "not what I expected. People are frequently surprised by how energizing the encounter can be. One Colleague said that it was nice to have Veterans validate her work as relevant to them and to have a group be excited about a study. In the early months of meetings soak up what might seem like small wins. If people come to a second meeting that is a big win.

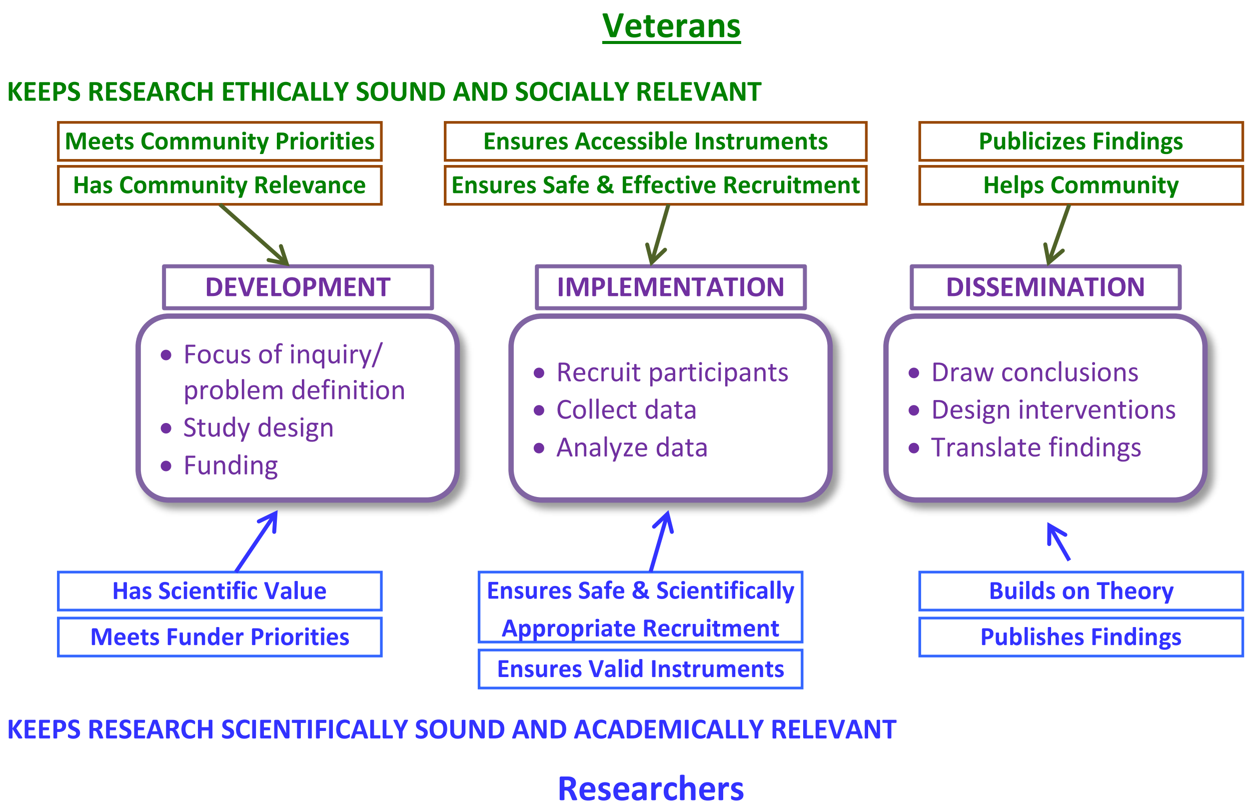
After you make it through recruitment, training and preparing processes, it is disappointing to have someone drop off before the group really gets going - but it happens. This is not necessarily a direct response to what you are doing – do not get discouraged. At one site, for example, a woman Veteran was recruited and in the phone interviews she was really excited about the opportunity. She had a natural curiosity and seemed like a great fit. When she didn't come to the first meeting (even after confirming the day before) the group liaison was concerned. Following the meeting the liaison got a voicemail from the woman saying that she drove all the way to the VA, but when she got there she couldn't get out of the car. She just not could bring herself to walk into the hospital, so she sat in her car a while and then she left for home. There are times when you find the right person and it just isn't the right time for them to join. If possible, keep the door open so that if their situation changes in a year or some time down the road, there is an option to join the group later.

As a group, the SERVE team debated where to put ***EVALUATION*** in the toolkit. It is a stand-alone section that can be reviewed at any stage – see **Section 5 of this toolkit**. Some groups expressed that getting a group implemented was tough enough and that thinking about collecting measurement data was too overwhelming. Others didn't think about data at this Convening stage and later wished they'd collected baseline data. It is up to you if and when you are able to tackle measurement. In the meantime, there is one more thing to do once you have successfully convened your first Engagement Group meeting: take some time and reflect on the process.

- What surprised you?
- How engaged were all participants in the discussion?
- What might you want to do differently or try next time the group meets?
- Did anyone eat the snacks – which ones?

Early Engagement: Understanding Personal Drivers

There is also reflection that can help you stay in alignment with your engagement goals and make adjustments when needed. The model below may be helpful for thinking about why participants come to engagement encounters.



Adapted from Dora Raymaker, Katherine McDonald, Christina Nicolaidis, 2009. Contact dora@aaspireproject.or

The model is designed with **Community Based Participatory Research** in mind, but it also applies to Veteran engagement. It is a nice reminder that different participants in Engagement Groups can have similar and different goals that keep them engaged. Maintaining an open line of dialogue with an Engagement Group and the local researcher community will help surface challenges before they become problems. Keeping these different reasons or motivators in mind will help you build bridges when needed and ultimately cultivate a strong and resilient group.