
Engaging Veterans in Research



VA | U.S. Department
of Veterans Affairs



**School of Medicine
and Public Health**
UNIVERSITY OF WISCONSIN-MADISON



Health Innovation Program
Integrating healthcare research and practice

QUERI

VA Quality Enhancement Research Initiative

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Use of the Toolkit



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The Engaging Veterans in Research Toolkit exists for the benefit of the health care community. These materials are available free of charge and can be used without permission; however, we ask that you register with HIPxChange prior to using the toolkit so that we may provide information on usage to our funders. It is acceptable to link to this Web site without express permission. If you decide to use the materials within the toolkit, we ask that you please credit the William S. Middleton Memorial Veterans Hospital, the University of Wisconsin – Madison Department of Medicine and the UW Health Innovation Program.

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Engaging Veterans in Research

Veteran engagement refers to the meaningful, bi-directional involvement of Veterans in the research process. In this context, Veteran engagement does not refer to Veteran participation as subjects of a research study or as a member of a focus group. Instead, they are engaged as active stakeholders who contribute feedback on the direction of the study while it is being planned, conducted, and/or disseminated.

The feedback given by Veterans is based on personal experience that is relevant to the research topic being studied. Their experiences in the military, with a specific health condition, or with receiving Veterans Administration (VA) services gives them a unique perspective and expertise that can serve to improve the quality and impact of research.

Engaging Veterans in research projects

There is no one way to engage Veterans in research. You can tailor their involvement to both the needs of the project and their interests, skills, and expertise. Veteran engagement can look very different for each study:

- ✓ Veterans could be involved on a project in a very short-term, as-needed basis as consultants. For example, they might be asked to provide feedback on the content of a survey or flyer.
- ✓ Veterans could also be much more in-depth, such as providing ongoing feedback as part of an advisory board or even being hired as a research team member.

There is no “right” way to engage Veterans. The only requirement is that the Veterans are engaged thoughtfully so that their feedback meaningfully impacts the project.

Who should use this toolkit?

This toolkit is intended for investigators and research team members who wish to engage Veterans as stakeholders in the design, implementation, and/or dissemination of their research.

What does the toolkit contain?

This toolkit contains guidance and resources researchers can use to effectively engage Veterans. Potential benefits include:

- Improved recruitment rates and diversity of participants
- Reduction in missing data or loss to follow-up
- Identification and refinement of high priority patient-centered outcomes
- Enhanced uptake and impact of research findings

How should these tools be used?

The materials in this toolkit can be used to:

- 1) Develop the skills and knowledge necessary to cultivate strong relationships with Veteran stakeholders
- 2) Find Veterans with expertise relevant to a specific research topic and the skills necessary to effectively provide feedback on research projects
- 3) Write a well-designed and feasible Veteran engagement plan
- 4) Guide effective Veteran engagement throughout the research process

Several tools and materials are included in this toolkit to help you successfully engage veterans in research projects. While much of the information in this toolkit is relevant to any researcher looking to engage Veterans, many of the resources referenced are specific to Wisconsin. These tools are depicted on this site where applicable. Additionally, to allow you to easily adapt the tools in the appendices for use in your organization, where appropriate, the tools are provided as editable files that you can download in a ZIP file on the [HIPxChange site](#).

Development of this toolkit

The Engaging Veterans in Research Toolkit was developed by researchers and clinicians (Principal Investigator: Nasia Safdar, MD, PhD) at the William S. Middleton Memorial Veterans Hospital and the University of Wisconsin-Madison School of Medicine & Public Health – Department of Medicine.

This project was supported by a grant from the University of Wisconsin Institute for Clinical and Translational Research (UW ICTR). Additional support was provided by the University of Wisconsin School of Medicine and Public Health's Health Innovation Program (HIP), the Wisconsin Partnership Program, and the Community-Academic Partnerships core of the UW ICTR, grant 9 U54 TR000021 from the National Center for Advancing Translational Sciences (previously grant 1 UL1 RR025011 from the National Center for Research Resources). The content is solely the responsibility of the authors and does not necessarily represent the official views of the National Institutes of Health or other funders. Nasia Safdar is supported by a VA funded Patient Safety center of Inquiry at the Madison VAH and a Eugene Washington Engagement Award from the Patient-Centered Outcomes Research Institute (PCORI).

Please send questions, comments and suggestions to HIPxChange@hip.wisc.edu.

Preparing to Engage Veterans

This section provides information regarding Military Structure, Culture, and Terminology that is vital to know prior to engaging Veterans. It also includes information regarding other Veteran Engagement Training and Resources, as well as General Stakeholder Engagement Training and Resources, that may provide additional useful information.

Military Structure, Culture, and Terminology

Before you engage with Veterans, it is important to have a basic understanding of the military, and its culture and terminology.

Veterans represent a broad cross-section of the American population, so it is important not to assume that their beliefs, values, and experiences are all the same. However, demonstrating an awareness of common military values and terminology conveys respect for the Veterans with whom you work and could help you to avoid missteps that could damage your working relationships with them.

Enlistment Process

1. The process for enlisting in the military starts with a physical examination and the Armed Services Vocational Aptitude Battery (ASVAB). New recruits take this multiple-choice exam to help determine which careers within the military they are best suited for.
2. They then meet with a service enlistment counselor to determine the right job specialty. The Military offers a wide variety of jobs and service members are often cross-trained as needed.
3. Recruits sign an enlistment agreement in which they typically commit to 4-6 years of active duty.
4. Once they have completed all requirements, the recruit takes the oath of enlistment:

"I, _____, do solemnly swear (or affirm) that I will support and defend the Constitution of the United States against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; and that I will obey the orders of the President of the United States and the orders of the officers appointed over me, according to regulations and the Uniform Code of Military Justice. So help me God."

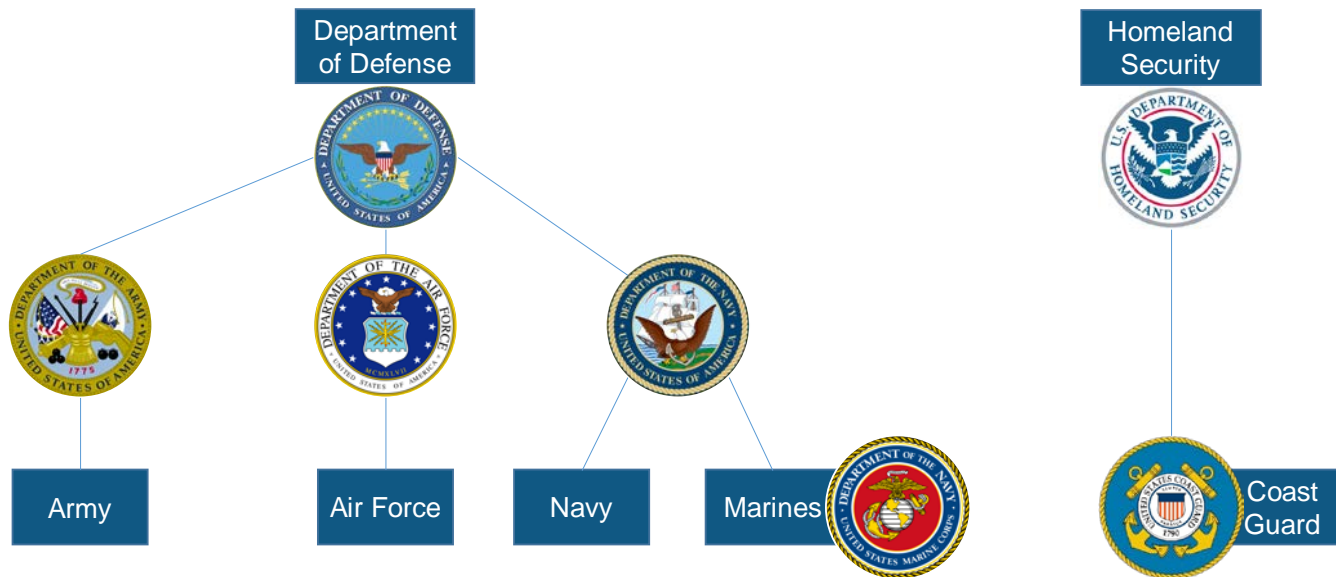
Military Rank

Rank is an important aspect of the military that influences a service member's social network, job prospects, and leadership opportunities. The table below lists military rank from lowest to highest in the chain of command.

Enlisted	Someone who has joined the military. A minimum of a high school diploma or GED is required.
Noncommissioned Officer (NCO)	An enlisted member who has risen through the ranks by promotion. NCOs serve as the link between enlisted personnel and commissioned officers. They hold responsibility for training troops to execute

	missions. Training for NCOs includes leadership, management, specific skills, and combat training.
Warrant Officers	Technicians and specialists who are highly trained within their field. Warrant officers comprise a relatively small part of the Army, Navy, and Marine Corps.
Commissioned Officers	Commissioned officers almost always possess at least a bachelor's degree and their primary function is to provide management and leadership in his or her area of responsibility. They do not 'enlist' but instead join the military as an officer.

Military Overview



Note: President has authority to transfer the Coast Guard to the Department of Navy. Congress can do the same during declared wars.

Mission	Defends the land mass of the U.S., its territories, commonwealths and possessions	Provides rapid, flexible, and, when necessary, a lethal air and space capability that can deliver forces anywhere in the world within 48 hours. Jurisdiction over air, space, and cyberspace	Maintains, trains, and equips combat-ready maritime forces capable of winning wars, deterring aggression, and maintaining freedom of the seas	Maintains ready expeditionary forces, sea-based and integrated air-ground units for contingency and combat operations, and the means to stabilize or contain international disturbance	Provides law and maritime safety enforcement, marine and environmental protection, and military naval support
Title					

Some Important Military Terminology and Acronyms

AO	
COIN	Counter Insurgency
Enlistment/ Commission	Aggregate duration of service in years. Individual increments of 4-6 years
MOS	Military Occupational Specialty, a servicemember's specific job in the military. A nine-character code is used to identify each specialty.
Stationed	Having a permanent/semi-permanent presence at one facility, installation, ship, or complex. Duty station assignments range from months to an entire enlistment

Recent US Wars

US Wars, World War II to Persian Gulf War

War	Time Period	Total US Service Members (Worldwide)	Living War Veterans	Veterans Receiving VA Benefits
Korean War	1950-1953	5,720,000	2,275,000	172,837
Persian Gulf War	1990-1991	2,322,000	2,244,583	2,160,897

Source: https://www.va.gov/opa/publications/factsheets/fs_americas_wars.pdf

Post-9/11 Wars

There are several operational names to describe the post-9/11 wars in the Middle East. Collectively, these wars are referred to by some as the *Global War on Terror (GWOt)*.

War	Time Period	Operational Name(s)
Afghanistan	10/7/2001 – present	<ul style="list-style-type: none"> Operation Enduring Freedom (OEF)

Additional Military Resources – Websites, Articles, and Videos

Resources on Military Culture

- [Community Provider Toolkit](#) – This online toolkit has a section devoted to military culture. Although the target audience is clinicians and mental health providers, much of the information provided is relevant to researchers working with Veterans as well. In particular, the [“Understanding Military Culture”](#) section provides links to online trainings, terminology resources, and information on military ethos.
- [Got Your Six Website](#) – In the military, “Got your six” means “I’ve got your back.” This organization facilitates collaboration between nonprofit, Hollywood, and government partners to normalize depictions of Veterans on film and television to dispel common myths about the Veteran population. The goal of this organization is to ensure successful Veteran reintegration and to empower Veterans to lead back at home. Their website contains a wealth of information, including the results of their [annual survey](#) on how Veterans are perceived.
- [Working with Veterans and Military Families](#) – This article by Kate Jackson in the March/April 2013 issue of *Social Work Today* discusses the efforts in the social work field to understand the multi-faceted issues that Veterans face, and to provide specialized resources and services to troops, Veterans, and military families.
- [Permission to Speak Freely - Episode 3: Did You Kill Anyone?](#) (3:40, aired 9/19/16) – This episode explores how Veterans feel when they are asked this offensive question: Did you kill anyone?

Resources Related to Service Era

World War II

- [WGCU Presents - WWII VETS: Stories of Service](#) (26:30, aired 5/24/15) - Veterans share their experiences serving in the United States Army and Navy in World War II.

Korean War

- [American Experience: The Battle of Chosin](#) (1:53:25, aired 11/1/16) – This documentary provides a view of this epic conflict within the Korean War from the perspective of the men who fought in it.

Vietnam War

- [A Conversation... - Vietnam — 40 Years Later](#) (27:07, aired 4/24/15) – Veterans and retired diplomats reflect on the final days of the Vietnam War and how diplomacy was used to restore America’s strength and respect in the years that followed.
- [OETA Presents - Native Oklahoma: Native Vietnam Veterans](#) (26:45, aired 4/2/15) - This episode focuses on the experiences of Native American Indian Vietnam Veterans.
- [KET Documentaries - Kentucky's Vietnam Veterans](#) (1:57:42, aired 11/10/16) – This documentary focuses on the personal stories of Kentucky’s Vietnam Veterans.

Global War on Terror

- [PBS NewsHour – What I’ll tell my son about fighting in the Iraq war](#) (4:29, aired 12/1/15) - Phil Klay, a Veteran and author of the National Book Award-winning book “Redeployment,” explains the difficulty service members experience as they try to discuss their experience and role in fighting a war with their families.
- [SOPTV Stories of Service - My Story of Service, Episode 8](#) (27:40, aired 7/27/15) - Steven Buckalew shares his experiences serving in the Marines in Iraq.

Resources on the Transition from Military to Civilian Life

- [Veterans Coming Home](#) – a cross-platform public media campaign that aims to bridge American’s military-civilian divide and address the needs of Veterans in local communities
- [The Widening Gap Between Military and Society](#), Thomas E. Ricks, *The Atlantic*, July 1997 issue
- [TPT Co-Productions - Crossing the Threshold](#) (26:40, aired 10/19/14) – This episode focuses on how we can support returning Veterans as they integrate back into the community and work.
- [Northwest Now – Veterans Transitions](#) (26:46, aired 4/1/16) – This episode focuses on Veterans’ transitions and efforts to make the changes easier for men and women leaving military service.

Resources on Physical and Mental Health Issues associated with Military Service

- [Permission to Speak Freely - Episode 2: We Got the PTSD](#) (3:38, aired 9/19/16) – This episode explores the misconceptions about Veterans with PTSD.
- [PBS NewsHour – The stigma that stops Veterans from getting help for PTSD](#) (9:06, aired 3/29/17) - Stigma often prevents Veterans from seeking treatment for post-traumatic stress. Former service members talk about how they struggled to accept the diagnosis and get help.
- [University Place - PTSD, Brain Injury and the Veteran Experience](#) (45:51, aired 10/29/15) – Experts discuss how trauma and traumatic brain injury affect Veterans in civilian and military life.

Veteran Engagement Trainings and Resources

- **VA HSR&D Veteran Engagement Work Group** - Formed in January 2015, the HSR&D Veteran Engagement Work Group focuses on ways to best incorporate Veteran input in research and to better foster engagement in Department of Veteran Affairs (VA) Health Services research. The group convenes via monthly conference calls. Subgroups have formed that focus on specific topic areas related to Veteran engagement within the VA. The group is open to any VA researcher who is interested in Veteran engagement. To request to join this work group, contact Courtney Lyndrup at Courtney.lyndrup@va.gov.
- **[VA Health Services Research & Development \(HSR&D\) Cyberseminars](#)** –VA HSR&D offers frequent Cyberseminars related to research within the VA. These Cyberseminars are archived. Several focused on Veteran engagement can be accessed at the links below:
 - [Increasing the Voice of the Veteran in VA Research: Recommendations from the Veteran Engagement Workgroup](#) – provides an overview of the HSR&D Veteran Engagement Workgroup’s recommendations to enhance Veteran engagement in research within HSR&D.
 - [Growing a Veteran Engagement Group \(VEG\): Examples from COINs](#) – provides an overview of the planning and implementation process involved in the development of center-level Veteran Engagement Groups at two Centers of Innovation (COINs) in Denver and Portland.
 - [Measuring Processes and Impacts of Veteran-Engaged Research](#) – focuses on the processes involved in Veteran engagement, the impacts this engagement has on research, and strategies to measure these impacts.
 - [Leveraging Health Experiences Research to Enhance Veteran Engagement](#) – describes Oxford University’s Database of Individual Patient Experiences (DIPEX) methodology to qualitatively collect and analyze patient interviews. The presenters describe the efforts of researchers to model this approach to create a similar database in the U.S. and how this database might be used to better incorporate the experiences of Veterans in research.
 - [The Importance of Stakeholder Engagement in Implementation Research: Examples from VA Women’s Health Research](#) – describes specific approaches to enhancing stakeholder engagement in implementation research.
 - [Working with Veterans Service Organizations to Improve your Research](#) – reviews the structure and goals of some Veteran Service Organizations (VSOs) and provides a brief history of collaborative relationships with VSOs in Southeastern Wisconsin in the past 10 years. The presenters discuss lessons learned on the academic side as a result of this collaboration.
- **[Veteran Engagement in Research: An Interactive Workshop for Researchers](#)** – a 2017 training facilitated by Drs. Nasia Safdar, Sara Knight, and Jeff Whittle covers strategies to effectively incorporate the Veteran perspective in research. Video of this training can be found on the UW School of Medicine and Public Health Video Library.
- **Strategic Alliances for Veteran Voice and Engagement (SAVVE)** – affiliated with the UW Institute for Clinical and Translational Research Community-Academic Partnerships (ICTR-CAP), SAVVE is an initiative aimed at helping researchers effectively engage Veterans in

impactful research. For more information, visit the [ICTR-CAP Stakeholder Engagement Resources](#) webpage and click on the “VA Hospital Research Program” link.

General Stakeholder Engagement Trainings and Resources

- **Patient-Centered Outcomes Research Institute (PCORI)** – PCORI is an independent, nongovernmental organization that was authorized in 2010 with a mandate to improve the quality and relevance of health-related evidence available to patient, caregivers, clinicians, employers, insurers, and policy makers. PCORI funds research that compares healthcare options to learn which works best, given patients' circumstances and preferences. PCORI emphasizes patient and other healthcare stakeholder engagement in the research process. The [PCORI website](#) contains a helpful resources for researchers engaging stakeholders in research. Of particular interest may be:
 - What We Mean by Engagement
 - The PCORI Methodology Report
 - PCORI Methodology Standards
 - PCORI Engagement Rubric
 - PCORI Compensation Framework
 - Sample Engagement Plans
- **UW Institute for Clinical and Translational Research (ICTR)** – UW ICTR was created to accelerate the translation of research findings into evidence-based policies and practices in order to improve health in the US. The [UW ICTR website](#) contains resources related to stakeholder engagement:
 - [Stakeholder Engagement Overview](#)
 - [Stakeholder Engagement Resources](#)

Health Experiences Research Resources

One focus of the VA HSR&D Veteran Engagement Work Group has been on how health experiences research (HER) can be used to more efficiently and effectively engage Veterans. HER involves the use of qualitative methods, particularly individual, narrative interviews, to capture patients' experiences with illness and illness-related care. These narratives complement surveys as a way to identify problems and solutions in delivering health care services.

Online Patient Narratives

The field of HER developed out of work done by the Health Experience Research Group (HERG) at Oxford University's Department of Primary Care Health Services. This group sought to develop a website that would provide reliable information on how people experience health and illness.

To this end, the HERG collected and analyzed health experiences using rigorous qualitative methods. They developed the Database of Individual Patient Experiences ([DIPEX](#)), a library of over 3,500 patient interviews on over 85 different health-related issues conducted in the United Kingdom. For each health topic, 30 to 50 interviews are collected from people of different backgrounds to capture the full range of experiences connected with a health condition. The interviews are video recorded if the patient consents.

Each study within DIPEX has an expert advisory panel that includes patients, health professionals, and researchers who are familiar with the health condition. The researchers must be trained in the DIPEX research methodology and use a specific qualitative methodology to analyze the interviews. With the patients' permission, excerpts of the interview video, audio, and written transcripts are made available online at www.healthtalk.org. Researchers can request the full interview transcripts for secondary data analysis.

Seeing the value in the HER methodology, researchers from the University of Wisconsin, Johns Hopkins University, Oregon Health and Science University, and Yale University sought to develop a similar resource in the United States. Using the DIPEX methodology, patient narratives are available on www.healthexperiencesusa.org. The site has a module on traumatic brain injury in Veterans. In the future, a module on Gulf War Illness in Veterans will be added as well.

Repository of VA Patient Narratives

Researchers with a VA affiliation also have access to a repository of de-identified transcripts of VA patient narratives that can be used for secondary data analysis. Currently, the repository contains interviews from patients with traumatic brain injury and patients with diabetes. Transcripts on additional topics will be added in the future.

If you are interested in gaining access to these transcripts for your own research project, or if you are interested in contributing to the repository, contact Erika Cottrell (cottrele@ohsu.edu) or Mark Helfand (mark.helfand@va.gov).

Recruiting Veteran Stakeholders

Finding Veterans to provide input on your research may seem daunting, especially if you are looking for Veterans with specific experiences or health conditions. However, there are several strategies you can use to find Veterans with the expertise you seek.

Veteran recruitment strategies

- ✓ **Reach out to people who work with Veterans** - If you do not already have Veteran contacts, you may want to reach out to people who work with the types of Veterans you are seeking to engage for their advice on how to successfully recruit Veteran stakeholders.
- ✓ **Use snowball sampling** - Many researchers who have engaged Veterans in the past have found the snowball sampling technique helpful. This technique involves asking colleagues and/or Veterans if they know any Veterans with relevant experience who might be interested in being stakeholders, and then asking each Veteran recommended to them the same question.
- ✓ **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

Listed below are different venues that may be helpful in your search for Veteran stakeholders.

VA Medical Centers

If you are looking for Veterans with specific experiences or health conditions, recruiting within your local VA Medical Center (VAMC) may be your best bet. You can ask relevant clinics and/or the publication department to distribute or post recruitment flyers.

You can also contact existing VAMC committees or programs that involve Veterans to see if they might be willing to help you find interested Veterans. Many VA employees are Veterans, so reaching out to staff is also a good way to find stakeholders.

Below is the contact information for committees and programs within the William S. Middleton Memorial Veterans Hospital in Madison that you may find helpful to contact:

- **Patient-Centered Care Committee** – this committee includes Veterans who use services provided at the William S. Middleton Memorial Veterans Hospital. They meet monthly to provide input on how to provide more patient-centered care at the hospital.

For information on their meeting schedule and to inquire about whether they may be able to help with recruitment, contact Joe Naylor at Joseph.Naylor@va.gov.

- **County Veterans Service Officers (CVSO) Committee** – this committee is made of CVSOs from across the state of Wisconsin. Each county has a designated CVSO who helps assure Veterans obtain the benefits they have earned. For more information on Wisconsin CVSOs, visit the [County Veterans Service Officers of Wisconsin website](#). This committee meets on a quarterly basis at the *William S. Middleton Memorial Veterans Hospital*. For information on their meeting schedule and to inquire about whether they may be able to help with recruitment, contact Joe Naylor at Joseph.Naylor@va.gov.
- **Patient and Family Education Resource Center (PERC)** – this center provides health education resources to Veterans who receive services at the *William S. Middleton Memorial Veterans Hospital*. They offer both inpatient and outpatient classes. Outpatient classes focus on health promotion, specific tests and procedures, medications, diagnoses, and treatments. For information on their meeting schedule and to inquire about whether they may be able to help with recruitment, contact Joe Naylor at Joseph.Naylor@va.gov.
- **Million Veterans Program** – the *William S. Middleton Memorial Veterans Hospital* participates in the Million Veterans Program (MVP), which is a national, voluntary research program. MVP is building one of the world's largest medical databases by collecting blood samples and health information from one million Veterans in order to study how genes affect health. You can ask to distribute recruitment materials to patients coming into the Madison MVP office by contacting Dave O'Connell at David.O'Connell@va.gov.

Veterans Service Organizations

Veterans Service Organizations (VSOs) vary widely in size and purpose, but all exist to benefit Veterans. Some VSOs are Congressionally chartered for the purpose of preparation, presentation, and prosecution of claims under laws administered by the Department of Veteran Affairs. To be Congressionally chartered, VSOs must meet certain minimum requirements in terms of portion of assets devoted to Veterans' services, and number of members or number of Veterans served. Some of the largest VSOs include the American Legion and Veterans of Foreign Wars (VFW). Membership-based VSOs are typically made up of local posts, chapters, or detachments. These local contingents vary in participation level and usually have elected leadership that changes on an annual basis.

- [House Committee on Veterans' Affairs list of Veterans Service Organizations](#)
- [U.S. Department of Veterans Affairs Directory of Veterans Service Organizations](#)
- [State of Wisconsin Department of Veterans Affairs list of Veterans Service Organizations](#)

Vet Centers

The Vet Center program was established by Congress in 1979 to help Vietnam Veterans deal with readjustment problems. Since then, eligibility has been extended to Veterans who served during other periods of armed hostilities occurring both before and after the Vietnam era. The

goal of the Vet Center program is to connect Veterans with counseling, outreach, and referral services to aid in their readjustment to post-war civilian life.

- [Vet Center Program webpage](#)
- [Vet Centers in Wisconsin](#)

Campus Veteran Centers

Many colleges have student centers and staff available to help student Veterans succeed. They are a place where Veterans can learn about state and federal benefits, meet other student Veterans, explore clubs and activities, and connect to resources.

- [Student Veterans of America](#)
- [UW System Student Veteran Centers](#)

Non-Profits and Other Organizations that Work with Veterans

Many non-profits and other organizations exist to support Veterans. Browse the internet and Facebook to find organizations in your area that serve Veterans with the expertise you seek. Some organizations in Wisconsin include:

- [Dryhootch](#) – a non-profit that helps combat Veterans in their return home by providing drug-and-alcohol-free coffee houses where Veterans can gather informally.
- [Easter Seals Southeast Wisconsin](#) – provides employment assistance services to Veterans and returning military services members.
- [Lifestriders](#)– this non-profit organization provides life-enhancing, physical, and psychological experiences and services for Veterans and individuals with special needs.
- [Milwaukee Homeless Veterans Initiative](#) – founded and run by Veterans, this organization provides Veterans help with obtaining benefits, housing, health care, furniture, household goods, food, clothing, transportation, toiletries, and other necessities.
- [Pets for Vets](#) – a program that supports Veterans and provides a second chance for shelter pets by rescuing, training, and pairing them with Veterans who could benefit from a companion animal. There is a chapter in [Madison](#).
- [Salute the Troops – Wisconsin](#) – a non-profit that provides financial, emotional, and professional resources to service members, Veterans, and their families in the Fond du Lac, Sheboygan, and Dodge County areas.
- [Wisconsin Veterans Foundation, Inc.](#) – based out of Waukesha, this organization assists Wisconsin Veterans by providing emergency financial assistance, assistance with connecting with Veteran and community-based programs, and counseling and emotional support.
- [Wisconsin VetsNet](#) – based out of West Allis, this organization assists Veterans with the following: emergency relief, homelessness, benefits and financial counseling, employment, substance abuse, mental health, relationship counseling, and legal assistance.

Developing Recruitment Materials

Developing well-made recruitment materials will be key to reaching Veterans with the right expertise and skills for your research.

Tips for creating engaging recruitment materials

When creating recruitment materials, such as flyers or recruitment letters, keep the following tips in mind:

- ✓ Recruitment materials need to be visually appealing and clear.
- ✓ They should succinctly convey the role of the Veteran stakeholder and the type of expertise you are seeking.
- ✓ Consider the language and any images used carefully so potential stakeholders are not dissuaded from participating.
- ✓ Any reimbursement or other benefits to participating should be highlighted.
- ✓ It's a good idea to get feedback from at least one Veteran on your recruitment materials before distributing them, if possible. If you do not know any Veterans, you could also seek out feedback from patients with similar characteristics, experiences, or education as the Veteran population you are targeting.

Another option, if you have funding available, is to consult with the [Wisconsin Network for Research Support \(WINRS\)](#). WINRS is a community and patient engagement resource at the UW-Madison School of Nursing that specializes in helping researchers across the U.S. find and work with under-represented or “hard-to-reach” populations. WINRS coordinates the [Community Advisors on Research Design and Strategies \(CARDS\)](#) service, a group of community members with diverse racial, socioeconomic, and educational backgrounds that provides feedback on research project materials.

Screening Potential Veteran Stakeholders

For projects that involve more in-depth or long-term Veteran engagement, a well-planned screening process is important to ensure that you recruit Veterans with the expertise, skills, and attributes necessary to be an effective stakeholder.

The goal is to find Veterans who can provide valuable feedback that will improve the quality of your research. There are certain strategies you can use to achieve this goal.

- ✓ Some researchers who have developed stakeholder advisory boards have found it useful to have prospective Veteran Stakeholders complete an application or statement of interest.
- ✓ Interviews can also be conducted to see if Veterans are a good fit for the stakeholder role.

The attributes that are likely to make a Veteran an effective stakeholder will vary based on the research the Veteran will be asked to review and the way in which the stakeholder will be engaged (i.e., center-level or project-level engagement board, incorporating stakeholder into the study team, etc.).

Potential attributes to seek in Veteran stakeholders

Some attributes that other researchers who have engaged Veterans have found to be valuable include:

- Knowledge of Veterans Health Administration
 - Receiving care within the Veterans Health Administration
 - Familiarity with services provided by the Veterans Health Administration
- Personal or caregiving experience with health condition being studied
- Focus on improvement
 - Motivated to improve services provided by the Veterans Health Administration
 - Proactive in looking for opportunities to identify, partner, and collaborate on finding solutions
- Excellent communication and listening skills
 - Able to share perspectives, insights, and information in constructive ways
 - Concerned with more than one issue or issues that do not directly affect them
 - Strong listening skills
 - Strong communication skills
 - Strong social skills
 - Respectful of differing opinions
 - Comfortable speaking in a group
- Able to represent more than just their own experience (not project own experience on all other Veterans)
- Experience on other kinds of advisory boards
- Research-specific attributes
 - Able to maintain open and productive communication with researchers
 - Respects the limitations of the research environment in meeting individual needs
 - Knowledge of or experience with research processes
- Commitment
 - Able to commit to being engaged for the duration needed for the project
 - Able to attend in-person meetings



Developing a Veteran Engagement Plan

Stakeholder engagement can be time-consuming and requires a higher level of investment in financial and staff resources than non-engaged research. Despite these drawbacks, the cost is well worth the effort – assuming you engage stakeholders effectively.

Veterans have valuable expertise that is based upon their background in the military, experiences with a specific health condition, and/or interactions with VA health services. Effectively incorporating their perspective into your research can drastically improve its quality and impact.

- ✓ Soliciting their input during the planning stage can help ensure you are studying topics and outcomes that are important and relevant to Veterans.
- ✓ Including Veterans as you conduct your study can improve your recruitment and retention, as well help you to more accurately interpret results.
- ✓ Once your study has concluded, Veterans can provide valuable insight that can help get effective treatments and innovations into practice faster.

Developing a well-designed engagement plan can help increase the likelihood that your collaboration with Veterans will be meaningful and effective.

A strong plan will clearly outline what the Veterans' participation in your research project will look like. This does not mean you cannot make changes to your plan as needed as your project progresses. It just means that you should spend time in the beginning thinking through the key aspects of engagement.

Important considerations include payment for stakeholder time and expenses related to engagement activities, meeting logistics, and communication during and between meetings. This section provides an overview of what you should consider as you develop your engagement plan.

Planning Engagement at Each Phase of Research

Veterans can be engaged in a variety of ways throughout your research study. The following section outlines possible ways Veterans can provide guidance in research, as well as references to articles describing examples of Veteran engagement in research.^{5,6}

Planning the Study

During the planning stage, Veterans can be engaged early to help identify and prioritize topics that are important to them. They can help develop the research questions, treatments, and outcomes to be studied. Veterans can provide feedback on plans for recruitment, data collection, and analysis. Conceptual frameworks can be developed with Veteran input or presented to Veteran stakeholders to verify the logic and identify additional factors not found in the literature.

Example of Veteran engagement in the planning stage

An article describing Veteran engagement in the planning stage is:

[Khodyakov et al \(2017\) Patient engagement in the process of planning and designing outpatient care improvements at the Veterans Administration Health-care System: findings from an online expert panel²](#)

Conducting the Study

Veterans can play many roles in helping to conduct research studies. They can participate in the drafting or revision of study materials and protocols. Once the study has begun, they can help with the recruitment of participants and data collection. Their perspective can be invaluable in the analysis phase in helping to interpret the data and assessing the believability of results. They may also suggest alternative explanations or approaches that researchers might miss.

Example of Veteran engagement in conducting research studies

Articles describing Veteran engagement in conducting research studies:

- [Mosack et al \(2012\) Veterans service organization engagement in 'POWER,' a peer-led hypertension intervention¹](#)
- [Ross and DeVoe \(2014\) Engaging Military Parents in a Home-Based Reintegration Program: A Consideration of Strategies³](#)
- [Ash et al \(2015\) Patient Narratives Representing Patient Voices to Inform Research: A Pilot Qualitative Study⁴](#)

Disseminating Study Results

Because of their connections to other Veterans and organizations that work with Veterans, Veterans can play a key role in disseminating the results of research. They can help identify partner organizations for dissemination and plan and participate in dissemination. Veterans may also be able to identify non-traditional opportunities to present or share information of the study to more effectively get evidence-based information into the hands of those who need it.

Funding Considerations

Veterans who engage as stakeholders in research are providing an expertise based on their experiences. They should feel they are adequately compensated for the time and commitment needed for them to provide this expertise. Often this means providing monetary compensation.

There are no specific rules on how much Veteran stakeholders should be paid. The appropriate amount will depend on the research project and what is being asked of Veteran stakeholders.

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- Researchers who have engaged Veterans in the past typically pay about \$25-\$50 per hour, with \$50 per hour being the most common amount.
 - Sometimes Veteran stakeholder are paid with gift cards instead of cash.
 - Veterans should be reimbursed for any costs associated with participation in the study, including transportation, food, and child care. PCORI has a [compensation framework](#) that provides some guidance on how to determine compensation amount.
 - Payment of Veteran stakeholders may be impacted by the type of grant that is funding your research.
 - Non-VA funding, such as PCORI, is typically more flexible on how Veteran stakeholders can be paid.
 - For VA funding, it's a good idea to talk to the appropriate people within your institution as you develop the budget for your grant to determine how to best pay your Veteran stakeholders.

Meeting Logistics

Complying with the Federal Advisory Committee Act (FACA)

If you are creating an ongoing Veteran engagement board for your research within the VA, you will need to make sure you comply with the Federal Advisory Committee Act (FACA). Groups that are subject to FACA are required to meet certain standards in terms of meeting structure, membership representation, and public access to meeting content. [The FACA FAQs for Managers document](#) provides an overview of the requirements of FACA.

Consult with leadership at your VA to determine how you can make sure you are complying with FACA. Other researchers who have developed Veteran engagement boards have complied in a couple of ways:

- One option in some VAs is to have Veteran stakeholders become an affiliate of the VA by obtaining “Without Compensation,” or WOC, status. With WOC status, Veteran stakeholders are considered to be a part of the VA and FACA does not apply. However, obtaining WOC status requires the Veteran to undergo a background check and several hours of training on privacy and VA regulations. This may be a burden that prevents certain Veterans from participating and may not make sense for more short-term research projects. Despite what the name implies, Veterans with WOC status can still be paid for their engagement activities.
- Another option for researchers is to establish a memorandum of understanding (MOU) with the VA institution where your research will take place. This MOU should explicitly state that the Veteran stakeholders are providing their individual viewpoints only and therefore their work does not implicate FACA.

Meeting Accessibility

To ensure you engage as representative group of Veterans as possible, it is important to consider how to make meetings accessible.

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- For in-person meetings, the location should be convenient to stakeholders and handicap accessible.
 - Consider the timing of the meeting and try to work around Veterans' work schedules and rush hour traffic.
 - Think about parking availability and accessibility to those riding the bus. If you hold the meeting at a VA facility, the Veteran stakeholders may be able to use VA transportation and schedule medical appointments on the same day to save them a trip.
 - You could also save them a trip by scheduling your stakeholder meeting before or after other meetings or events that your Veteran stakeholders will already be attending.
 - Depending on the nature of your project and the Veterans you hope to engage, you may want to consider more high tech modes of engagement such as internet interest and support groups, online collaborative forums, crowd-sourcing, and social media platforms.

Meeting Facilitation

Carefully consider who will facilitate your engagement meetings. Effective facilitation for stakeholder engagement requires skill and experience. You want somebody who has strong communication and listening skills and knows how to manage group dynamics effectively.

You can either hire an external facilitation professional or use someone within your research who has or can be trained in the appropriate skills. The advantages of using an external professional are that they will have significant facilitation experience and will come into the study with a more neutral viewpoint. However, an external professional will be more expensive and may not have the required familiarity with the research topic. The facilitator should have an understanding of military culture and terminology in order to work effectively with the Veteran stakeholders.

At the University of Wisconsin – Madison, the following organizations provide meeting facilitation services:

- [UW Survey Center](#)
- [Wisconsin Network for Research Support \(WiNRS\)](#)

Promoting Effective and Meaningful Engagement

To foster effective and meaningful engagement, it is important that everybody involved in the research project has similar expectations in terms of the project goals and their respective roles. As detailed below, there are a number of ways you can promote effective engagement.

Aligning Expectations

One way to prevent potential challenges to engagement is to explicitly discuss expectations for the project.

- ✓ Both researchers and stakeholders should be clear on what their expected role and time commitment will be.

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- ✓ Develop and agree upon a plan for how decisions will be made and how conflicts will be resolved.
 - ✓ Be clear on the scope, timeline, and short-term and long-term goals of the project as well as the scope, timeline and goals of the work the Veterans will be engaged in for the project.
 - ✓ For ongoing engagement groups, develop ground rules that are reviewed at the beginning of each meeting to remind team members of expectations in terms of how ideas are shared within the meeting. Depending on how often you meet, the facilitator may need to start out each meeting repeating the project goals, team member roles, and meeting ground rules.

Preparatory Materials and Training

Before engagement begins, you should consider what tools Veteran stakeholders, investigators, and other research team members will need in order for the Veterans to be engaged effectively.

Make sure everyone is familiar with relevant acronyms and terminology. Veterans may need information on specific medical terms, jargon used in your research area, and acronyms for organizations relevant to the work. Research team members may need to learn about the purpose and goals of engagement and military terminology and acronyms.

Orientation for Investigators and Research Team Members

To make sure investigators and other research team members are prepared to effectively engage with Veterans, you may find it helpful to provide them with an orientation. This can be individually or in a group.

- ✓ You will want to discuss the purpose and goals of engagement in your research project and what the engagement process with Veterans will look like.
- ✓ If the investigator will be presenting their project to an engagement group for feedback, you will want to let them know how to effectively describe their project and the feedback they are hoping to get from the Veterans.
- ✓ You may also want to provide some information on the background and experiences of the Veteran stakeholders.

Orientation for Veteran Stakeholders

Having an orientation for Veteran stakeholders is a good way to make sure they are clear on their role and have the information they need to participate effectively as a stakeholder.

- ✓ You may want to provide some information on your institution, the type of research you do, and health services research more generally.
- ✓ Give some background information on stakeholder engagement and what you expect their role as a stakeholder will look like.
- ✓ Developing a handbook for Veteran stakeholders may be a good way to provide the information so that they can refer to it as needed.

Evaluating the Engagement Process

Evaluation of the engagement process can provide important information on the quality of the engagement that can be used to improve engagement in your research in the future. It can also provide valuable insight into how engagement impacted your project.

To evaluate the engagement process, you can ask stakeholders questions that measure their assessment of the level of transparency, quality of communication, access to needed information, and clarity of project roles. You can also ask them about the degree to which they felt their input was used, the degree of confidence they have in the study results, and the degree of ownership they feel for the project.

The VA HSR&D Cyberseminar “[Measuring Processes and Impacts of Veteran-Engaged Research](#)” provides an overview of evaluation as it relates to Veteran engagement.

References

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