

# Periodic reflections: a method of guided discussions for documenting implementation phenomena

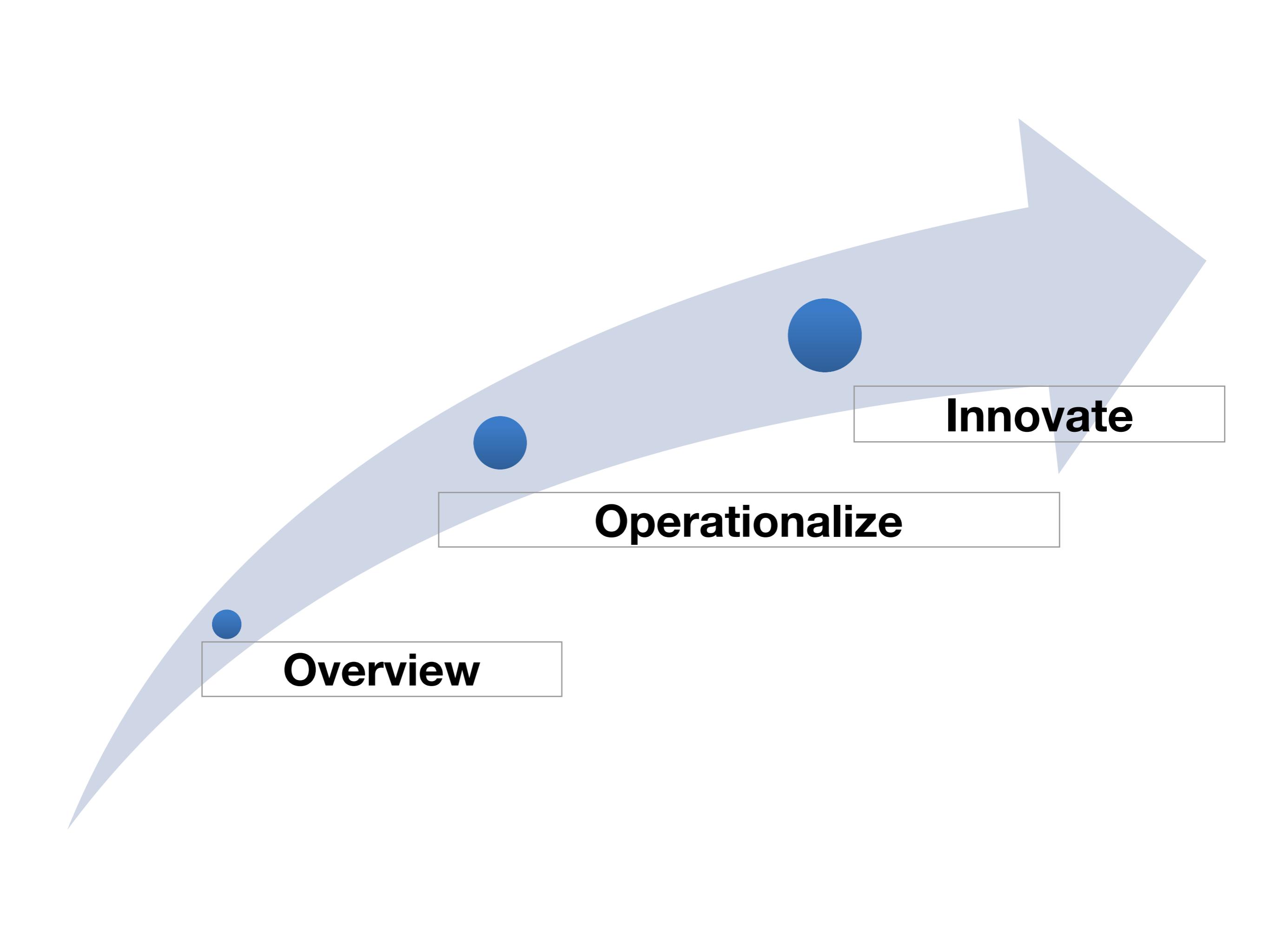
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QUERI Implementation Network

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**Overview**

**Operationalize**

**Innovate**

# Acknowledgements

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- EMPOWER QUERI team
  - Tannaz Moin, MD, MBA, MSHS & Sally Haskell, MD (DPP Co-PIs)
  - Bevanne Bean-Mayberry, MD, MHS, FACP & Melissa Farmer, PhD (CV Toolkit Co-PIs)
  - Alison Hamilton, PhD, MPH & Ariel Lang, PhD (CCWV Co-PIs)

# Ethnography

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- Methodological approach characterized by:
  - Close engagement with a social group over time
  - Multiple methods to ensure triangulation
  - Grounded in “people’s actions and experiences of the world, and the ways in which their motivated actions arise from and reflect back on those experiences” (Brewer 2004)
  - Insider (emic) viewpoint(s)

# Ethnographic Methods

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- Tools for observing behavior in a natural environment
- Understanding the “why”
- Observing the difference between what people say and what they do
- Attentive to local ecology and multi-level phenomena

Increasing pressure on VA to deliver PTSD care amid Iraq/Afghanistan wars

Providers with CBT-based training entering VA mental health workforce

## **PTSD in the VA: 2007-2008**

National legacy of Vietnam and shame in “failing” that generation of Veterans

Family members with varying understanding/acceptance of PTSD

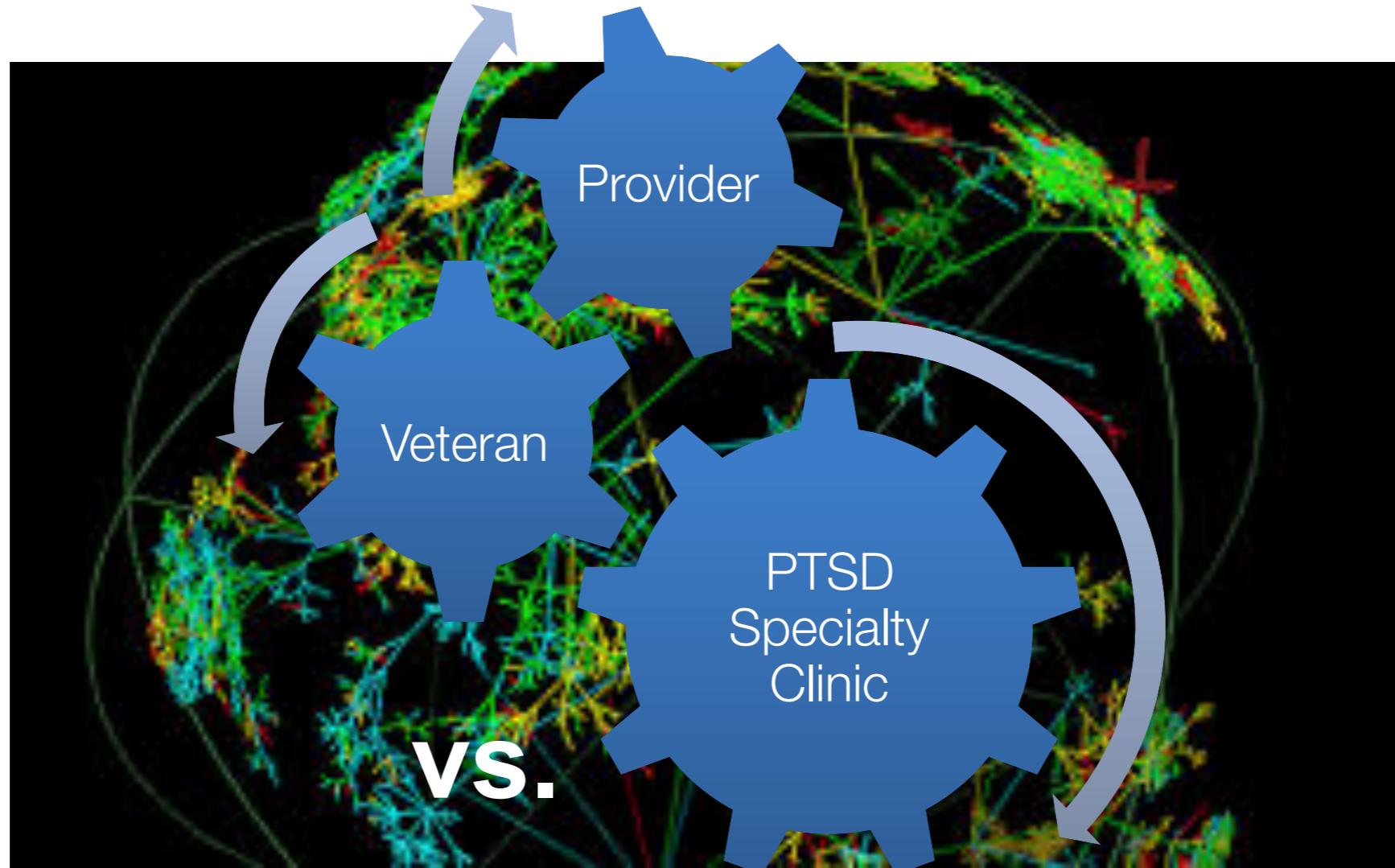
Providers with psychodynamic training and long experience of Veterans in treatment for many years

Accumulating evidence for effectiveness of EBPs for PTSD

Walter Reed, Norma Perez, and other scandals

One of the most significant initial obstacles to implementing evidence-based psychotherapies for PTSD was the maintenance view of PTSD held by some therapists and patients, suggesting that PTSD is a lifetime disorder and that recovery is not possible.

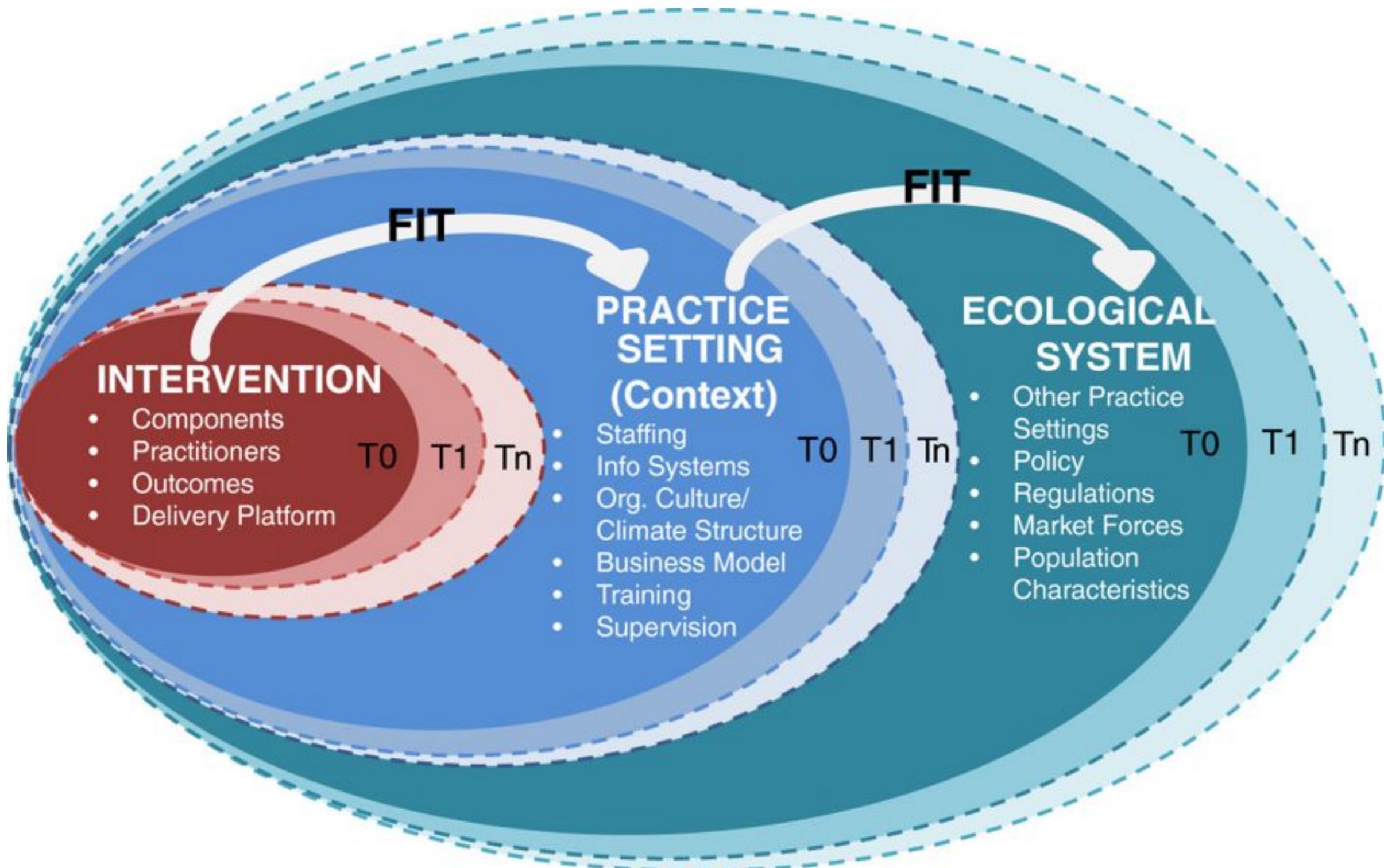
Karlin et al., 2010



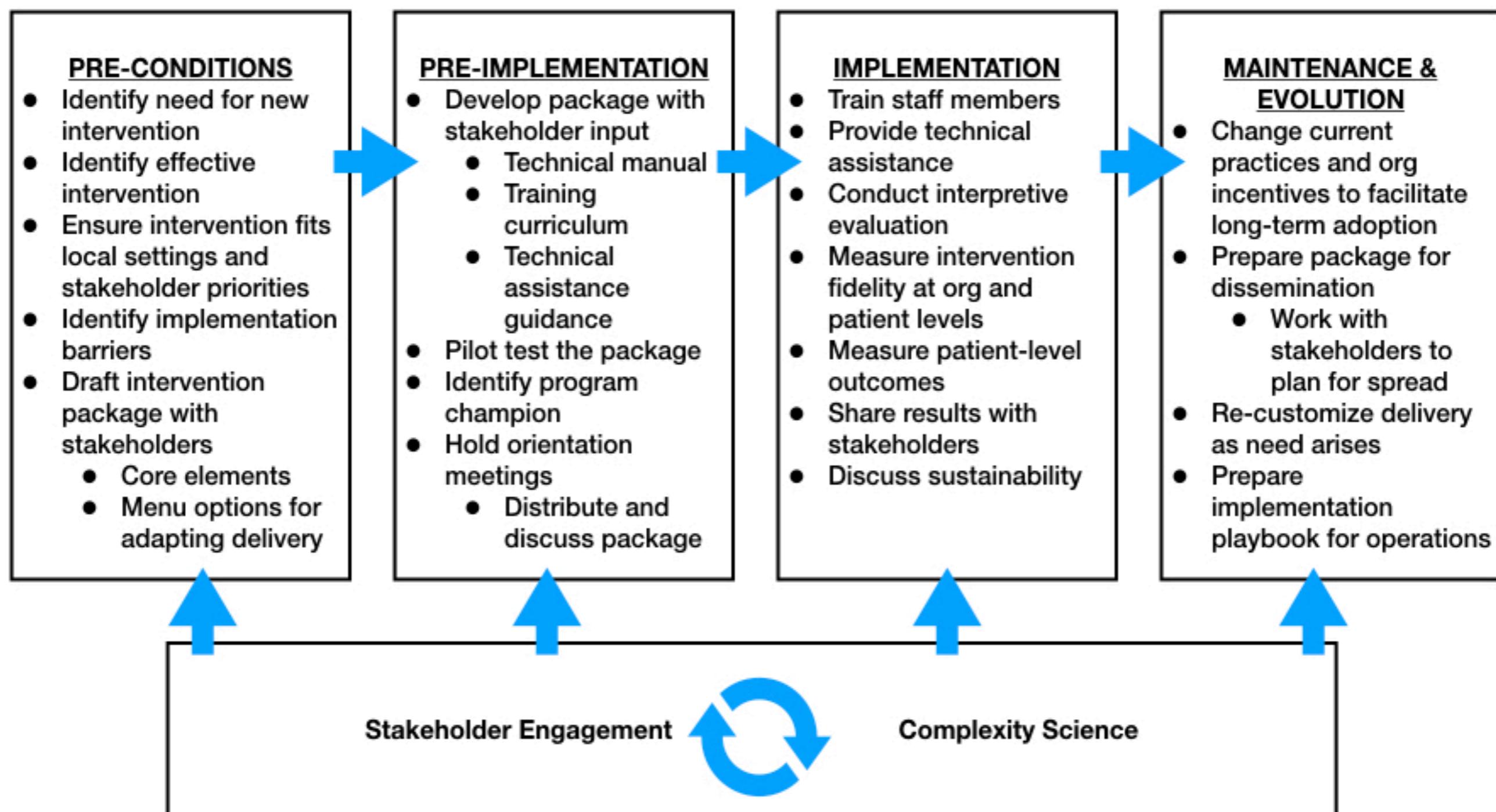
# Role in Implementation Science

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- Qualitative Methods in Implementation Science (<https://cancercontrol.cancer.gov/IS/docs/NCI-DCCPS-ImplementationScience-WhitePaper.pdf>)
  - Elicit stakeholder-centered perspectives
  - Inform design and implementation
  - Understand context across diverse settings
  - Provide documentation and encourage reflection
  - Gain insight into implementation effectiveness
  - Understand mechanisms of change
  - Contribute to theoretical development



# Replicating Effective Programs (REP)





Tailoring VA's Diabetes Prevention Program to Women Veterans' Needs (DPP; Moin/Haskell)



Facilitating Cardiovascular Risk Screening and Risk Reduction in Women Veterans (CV Toolkit; Bean-Mayberry/Farmer)

- 4-year, 4-site implementation research study



Implementation of Tailored Collaborative Care for Women Veterans (CCW; Hamilton/Lang)

- 4-year, 4-site implementation research study

# Periodic Reflections

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- 30-60 minute phone calls
- Lightly guided
- Individuals, dyads, teams
- Flexible, allow for multiple perspectives
- Documentation of events
- Reflection and sensemaking
- Ethnographic in allowing close engagement, over time, multi-layered emic perspective

# Who? Discussion Lead

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- Anthropologist or other qualitative researcher
- Training in reliable, rigorous data collection
- Flexible to needs of participants with varying power, expertise, buy-in
- Facilitation skills to identify and support moments where team dialogue is needed

# Who? Participants

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- Individuals and small groups closely involved in making implementation happen (1-5 individuals)
  - Principal investigators, co-investigators
  - Project managers, assistants
  - Facilitators, coaches; frontline staff/champions with ongoing role
  - May want to hold separate reflections based on role, power differential
- Key agents may vary across time with changing teams or study needs, implementation phase, site involvement.

# What?

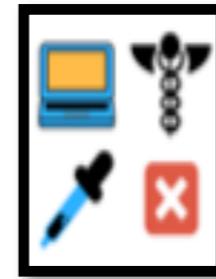
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Main Activities



Adaptation of  
Implementation  
Plan



Adaptations to  
Intervention



Stakeholder  
Engagement



Changing  
Environment

# What? Content

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- Intro: *These reflections are intended to provide an opportunity to check in regularly about how implementation efforts are going. Our main goal is to take a few minutes to discuss, document, and reflect on key activities, events, and changes occurring over the course of implementation.*
- Date, roles of participants
- What are the current main activities for the project? How is it going?

# Content (cont.)

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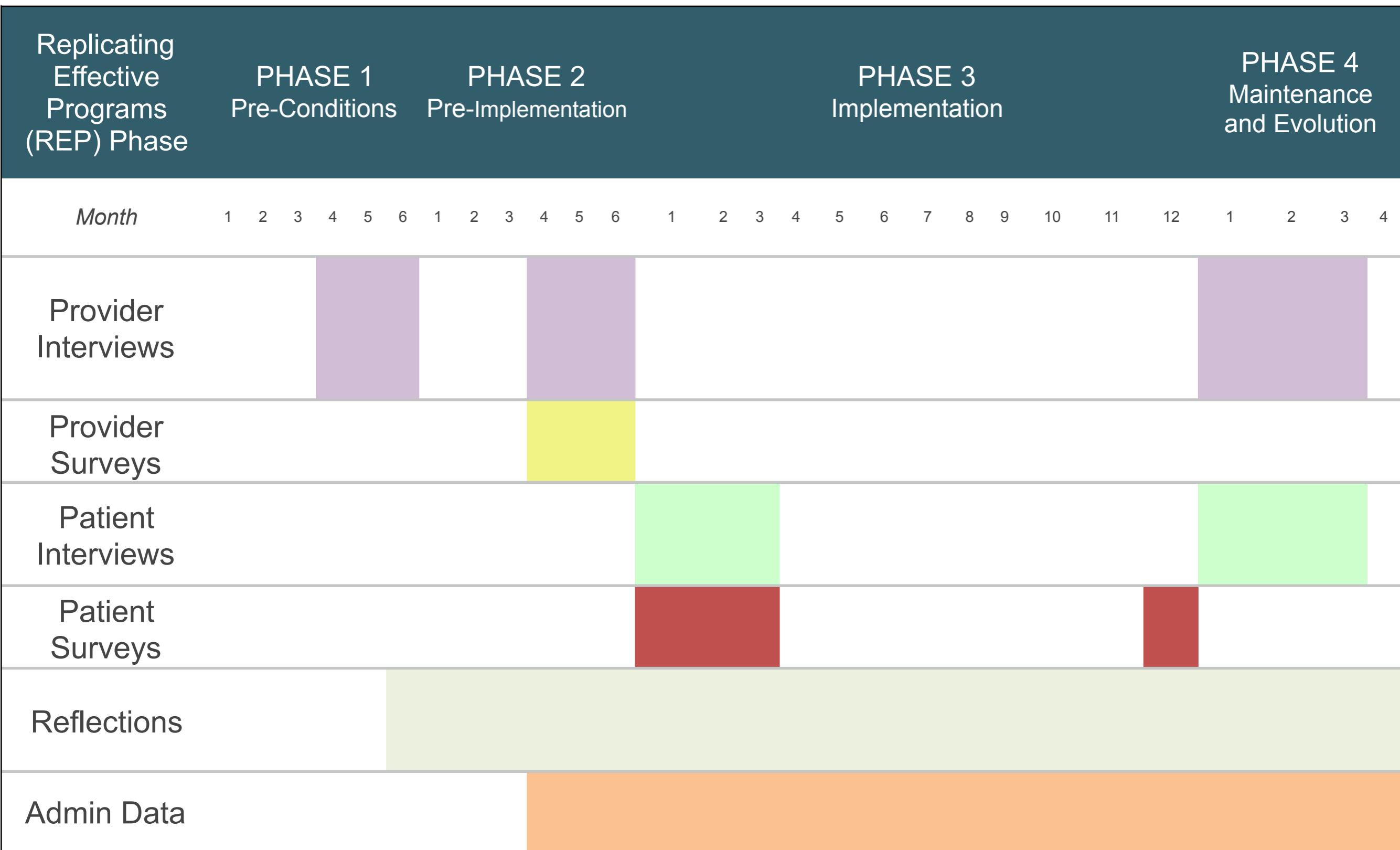
- Have there been any changes to how the intervention is delivered in the past [month or so]?
- Have there been any changes to the implementation plan in the past [month or so]?
- Have there been any stakeholder engagement efforts in the past [month or so]?
- Have you seen any recent changes in the local or national environment that you think may have impact for implementation?
- What are the next steps going forward?

# Optional Prompts (as needed)

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- Have particular barriers/concerns arisen recently?
- What solutions have been tried? How is that going?
- Who have been the key people involved in recent activities, efforts, and discussions? What have been their primary concerns, hopes, and/or suggestions?
- Have there been any surprises lately, or unexpected events?
- What lessons have been learned?

# When? Multi-Method Evaluation



# When and How Often?

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- “Periodic” to allow flexibility
- Basic rule: more frequent where more action
  - Some team members more involved
  - Some phases more active (e.g., pre-implementation, launch)
  - Time-sensitive to events (e.g., sudden context change or staff member leaving)
  - Be mindful of burden and buy-in

# How?

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- Modality:
  - Can be conducted by telephone or in-person
  - Notes vs. recording/transcribing
- IRB approvals
- Timing of analysis: ongoing, periodic, retroactive

# EMPOWER QUERI

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Tailoring VA's Diabetes Prevention Program to Women Veterans' Needs (DPP; Moin/Haskell) **12**



Facilitating Cardiovascular Risk Screening and Risk Reduction in Women Veterans (CV Toolkit; Bean-Mayberry/Farmer) **38**



Implementation of Tailored Collaborative Care for Women Veterans (CCWV; Hamilton/Lang) **42**

# Sample Approaches to Analysis

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- Coding
  - Deductive: specific frameworks, constructs
  - Inductive: emergent themes
- Case study
- Integration with other data sources

# Dynamic Implementation Ecology

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“[There’s change in] the climate around doing remote delivery of healthcare, which I think VA is increasingly interested in... different than two years ago when we submitted the [project] proposal.”

# Adaptation of Intervention

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“The professional coach...said last week, ‘I could just cry - how wonderful the sharing between the women in the groups is... It’s pretty amazing the relationships that have been building the last couple of months. What are we going to do when this finishes? I hope they will have an opportunity to meet.’ In the past we’ve done maintenance groups once a month or something and we can do that if enough people are interested.”

# Adaptation of Implementation

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“The other thing that developed... was that we ended up having to have a communication plan... The marketing strategy.”

# Team Sensemaking

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“We can’t change someone’s financial [situation]. Women [in DPP groups] are giving each other advice on where to buy fresh produce. It’s trying to get at the issues that are probably why these women are so obese and have health issues to begin with. No class is going to teach those things. The real life translating to your real-world situation. I don’t know what the family and social issues are, but there’s a lot of talk about that. Those are the things that can motivate or really unmotivate somebody.”

# Case Study: Collaborative Care For Women Veterans

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**Month 1: I'm having the time of my life doing this – this is the best job I've ever had....I really want it to succeed because [CALM is] a terrific model.**

While learning and implementing CALM, the CCWV Case Manager engaged in **adaptation** around the **perceived needs of Veteran patients**, and **sensemaking** around her **ability to meet those needs given barriers**.

# Case Study: Collaborative Care For Women Veterans

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**Month 3: I'm certainly getting much smoother at [CALM]... Proximity – sitting close together, is an issue for some veterans.... You just don't usually pull a chair up close to someone you don't know....That's part of why I spend a little less time doing the computer part. Maybe I'm partly adapting without thinking about it.**

## **ADAPTATION: REDUCED TIME DOING ONLINE CALM**

While learning and implementing CALM, the CCWV Case Manager engaged in adaptation around the perceived needs of Veteran patients, and sensemaking around her ability to meet those needs given barriers.

# Case Study: Collaborative Care For Women Veterans

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## **Month 11:**

I have a lot more confidence when somebody is ‘I don’t know about this program’, I can speak a lot more confidently. ‘Just hang in there a little bit, we’re getting to the good stuff.’ Adding in my own pieces...[not] just sitting down at a monitor together going through this stuff.

While learning and implementing CALM, the CCWV Case Manager engaged in adaptation around the perceived needs of Veteran patients, and sensemaking around her ability to meet those needs given barriers.

# Integration: Tailored Diabetes Prevention Program (DPP)

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- Clinical Outcomes: Greatest weight loss and engagement associated with online DPP
- Reflections: Observing adaptations indicates that in-person groups may be easier to tailor to local and/or individual needs; menu options
- Interviews: Women Veterans valued the option to select a modality that worked for them
- *Integration aids planning for spread*

# Reflections in Use

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- Evaluating a facilitation strategy to implement video telehealth to home for rural Veterans
  - External facilitator dyads
  - Reflections as a strategy
- Rapid roll-out statewide buprenorphine waiver initiative #GetWaiveredTX
- Elizabeth Dole Center of Excellence for Veteran and Caregiver Research
  - Using reflections during trial/pilot phase to aid in implementation planning

# Limitations

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- Require time, commitment, buy-in
- Requires trust, psychological safety
- Requires upfront team discussion, agreement on how information will be used
- Cannot replace direct observation

# Closing Thoughts

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- Ethnographic approaches can be of value in implementation, particularly in understanding context, social and cultural dynamics, and change over time
- Increasing recognition of need for pragmatic strategies for building ethnographic methods into implementation and evaluation, e.g., periodic reflections
- Reflections are well-suited to meet the needs of flexible, dynamic implementation work

# Thank you!

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