ALIGNING ACTION FOR HEALTH ®

Research Ready

training for clinical staff

Implementation Guide

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Introduction

What is *Research Ready*?

Research Ready is a suite of tools developed by the Louisiana Public Health Institute (LPHI) for engaging clinic staff as a unique stakeholder group in pragmatic research including patient-centered outcomes research (PCOR). Pragmatic research is designed to test interventions in everyday clinical settings to maximize applicability and generalizability and see if an intervention works in real life conditions. Clinic support staff, such as medical assistants and nurses, are essential partners in pragmatic research. We identified that it is imperative to engage clinic staff as a unique stakeholder group who inform and improve pragmatic research approaches, effectively communicate with patients and clinicians about research, and understand the value of research for patients and health systems.

Through previous experiences implementing pragmatic PCOR studies, LPHI identified lack of engagement of clinic staff and their limited knowledge of research fundamentals as key barriers to the successful implementation of studies that take place in outpatient healthcare settings. However, after thoroughly searching NCBI, PubMed, SpringerLink, Bio Med Central, and other scholarly databases using keywords such as “pragmatic research training,” “clinic support staff training,” “research roles in clinics,” and “role of clinic support staff in research,” it became evident that clinic support staff have not been the target of interventions for improved research implementation within healthcare settings. LPHI developed *Research Ready* to address the present gap in training to prepare clinic staff for their role in pragmatic research.

Purpose of This Guide

This guide is designed to outline the elements of the *Research Ready* training, its timing, available formats, and provide guidance in implementing the training at a clinic. We also provide recommendations for follow-up and additional resources at the end of this guide.

Who Should Use This Guide

This guide should be used by anyone who is planning to provide the *Research Ready* training to a group of clinic staff. A person who leads the implementation of *Research Ready* may have one of the following roles:

- A leader or staff member at a clinic that is currently conducting pragmatic research studies.
- A leader or staff member at a clinic that is interested in conducting pragmatic research studies in the future.
- Investigators aiming to involve clinic staff in carrying out research.
- Study managers or coordinators who are preparing to implement a study in a clinic setting.

How *Research Ready* was Developed

The development of the *Research Ready* training was heavily informed by the experiences of clinic staff and researchers. Key informant interviews were conducted with clinic staff, research staff, and investigators to better understand their perceptions and challenges with clinic-based research. A project advisory group composed of both clinic and research representatives was convened to inform the development of the training materials and give guidance and feedback on aspects of the project. It was through an iterative process between the advisory group and the project team that the training was drafted, reviewed, and evolved to meet the needs of the intended audience.

The training was initially piloted at three sites and was found to increase participants' knowledge about research and was easy to understand, according to participants' feedback. Later, through a larger dissemination and implementation effort, the *Research Ready* training was evaluated by assessing users' experiences with the training through a survey and by assessing practices' experiences with implementing the training through interviews with clinic leaders. Again, the training was found to be easy to understand and effective at increasing participants' knowledge of research. We also found that clinics felt the training was easy to implement.

Based on the results of the pilot and scaled-up implementation as well as feedback from the advisory board members and colleagues, we believe that *Research Ready* effectively fills a resource gap in training for staff that support pragmatic research at their workplaces.

About *Research Ready*

Description

Research Ready is a training to improve clinic staff capacity to partner in research. The training was developed to inform clinic staff, such as medical assistants and nurses, about basic research principles and considerations for supporting the implementation of research in a clinical setting. *Research Ready* is available in four formats: e-learning, facilitated session, virtual session, and self-guided workbook.

Research Ready Training Objectives

- Participants will be informed of the importance and benefits of pragmatic research in the clinic setting.
- Participants will learn the major steps of the research process.
- Participants will understand the structures in place to protect human subjects and maintain research integrity.
- Participants will learn why clinic staff are key to success of pragmatic research studies.
- Participants will be prepared to champion clinic-based research and receive tips on how to balance clinical work with research activities.
- Participants will be informed of their potential responsibilities in research.

When to Implement the Training

Clinics and their staff should complete the *Research Ready* training before a study begins. Based on key informant interviews and participant feedback, staff found information most useful and relevant right before the implementation of a study because the information was immediately actionable for the participants.

Additionally, the training can be repeated as a periodic refresher for staff. *Research Ready* can also be used as part of orientation and onboarding for new staff at clinics that are active in research.

Training Topics

What is Research?

Describes health research, pragmatic research, their benefits, and how research different than quality improvement.

The Research Process

Explains the steps researchers perform in studies to support their research question.

Research Integrity

Discusses patient protections and the importance of following protocol and avoiding bias.

Working with the Study Team

Gives participants advice to empower them to successfully work with study teams on research at their clinic.

Summary & Quiz

Throughout the training, participants are presented with knowledge checks aligning with the topics. Short quizzes help not only impart information to participants but also serves to keep them engaged throughout.

Intended Audience

The intended audience for this training is clinic support staff in roles such as:

- Medical assistants
- Nurses
- Front desk/registration
- Care coordinators
- Social workers

Due to their relationships with patients and potential research-related tasks, medical assistants as well as nurses benefit the most from participating in the training. This includes knowledge gain about research principles and increased comfort communicating with patients about research.

Format Selection

The *Research Ready* training was originally developed to be a self-study workbook that could be augmented by an in-person facilitated training that followed the content of the workbook. The e-learning was created in response to a request from a partner clinic organization who wanted to incorporate it into their learning management system to reach more staff. The virtual facilitated training was created in response to the COVID-19 pandemic. When safety concerns and travel restrictions associated with the pandemic made in-person training unfeasible, LPHI adapted the workbook content into a set of slides and conducted trainings using virtual meeting technology.

The table below lists the most mentioned pros and cons for each of the training formats. We recommend considering these factors when selecting which format of *Research Ready* you will implement.

Format	Pros	Cons
E-learning	self-paced	ensuring completion technology required
Workbook	self-paced no technology required	printing costs ensuring completion
Virtual Session	real-time interaction	time commitment technology challenges
In-person Session	real-time interaction	time commitment

Implementing the *Research Ready* Training

The *Research Ready* training is available in four formats: e-learning, self-study workbook, virtual facilitated training, and in-person facilitated training. This section describes the resources and actions that are needed to successfully implement each format of the training. In addition, general recommendations for all formats are provided below.

General Recommendations

- Consider implementing the training right before the launch of a new research study, then provide the study-specific training. It is helpful to have immediate applicability of concepts. Providing *Research Ready* before study-specific training will help participants understand the study-specific tasks assigned to them.
- Include allocations of time, staffing, and funding for the implementation of the *Research Ready* staff training in project proposals for pragmatic studies. This will ensure that you have the resources to implement the training before participant enrollment begins.
- Use incentives (such as gift cards or meals) to help engage staff in the training and/or to compensate staff for their time spent completing the training. Include a line item for these incentives in the project budget.
- Implementation of *Research Ready* should have an assigned owner or champion to plan and execute the key implementation steps and make sure the training is completed by all targeted staff members.
- Make the *Research Ready* workbook available to participants so they can use if for future reference. You may download the *Research Ready* workbook for your clinic's resource library or e-mail it to participants. Information on how to access the workbook can be found in the Resources section of this guide.

E-learning

Materials:

- *Research Ready* e-learning module: The module may be accessed on LPHI's website, or it can be integrated into your organization's learning management system. A link is provided in the Resources section of this guide.
- Computer access for each learner: The e-learning may be stopped and resumed from the stopping point. This allows for learners in a busy workplace to stop and start the module as their time allows. However, this feature does not work if a computer is shared and multiple users attempt to complete the training in the same time span.

Timeline:

- The e-learning module takes approximately 60 minutes to complete in its entirety.
- We recommend setting a specific due date for completion of the e-learning. Giving users two weeks to complete the module is usually sufficient as it allows flexibility but is not too open-ended.
- If your organization opts to integrate the *Research Ready* e-learning module into its own learning management system, allow time for requesting and receiving the module from LPHI as well as uploading the module into your system.

Trainer/Facilitator Role:

- Determine best method for making the e-learning available to staff (integrating into learning-management system or direct link to LPHI's website).
- Provide learners with information on how to access the e-learning module.
- Track and document learners' completion of the training.

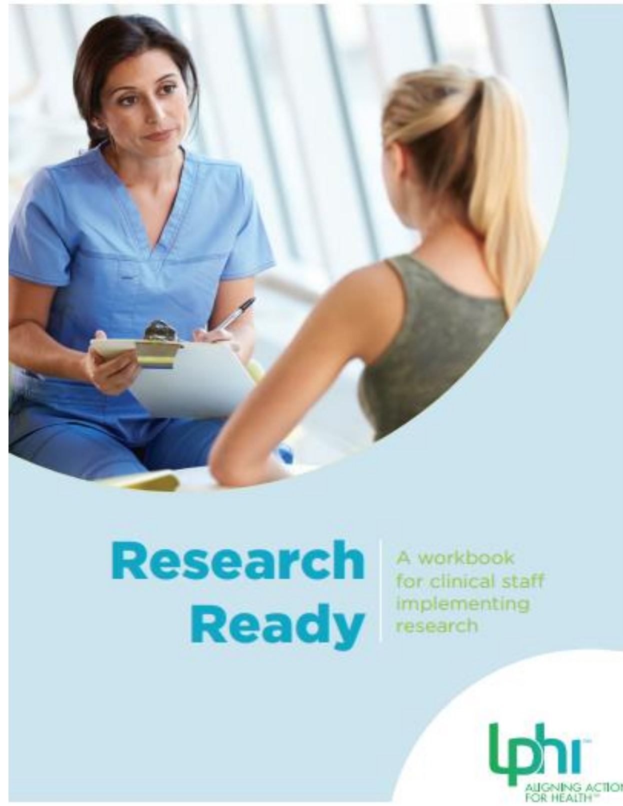
Implementation Steps:

1. Inform staff of the training. In your messaging, include why the training is important and how it relates to their work and to patient care.
2. Instruct staff how to access the e-learning and tell them how long they have to complete it.
3. Perform periodic checks during the implementation period to determine which staff members have completed the training. This may involve pulling reports from your learning management system or asking staff to attest to their completion of the training.

Self-Study Workbook

Materials:

- Printed copies of *Research Ready* self-study workbook: PDF can be accessed for viewing and printing on LPHI's website. A link is provided in the Resources section of this guide.



Trainer/Facilitator Role:

- Download the *Research Ready* workbook (cover is shown in the image on the right) and print the needed number of copies.
- Distribute workbooks to learners.
- Track and document learners' completion of the training.

Timeline:

- The workbook takes approximately 60 minutes to complete in its entirety.
- We recommend setting a specific due date for completion of the workbook. Giving learners two weeks to complete the module is usually sufficient as it allows flexibility but is not too open-ended.

Implementation Steps:

1. Inform staff of the training. In your messaging, include why the training is important and how it relates to their work and to patient care.
2. Distribute *Research Ready* workbooks to staff and tell them how much time they have to complete it.
3. Perform periodic checks during the implementation period to determine which staff members have completed the training. This may be asking staff to attest to their completion of the training or requiring them to submit a quiz at the end of the workbook.

Virtual Facilitated Training

Materials:

- *Research Ready* virtual training slides: Contact LPHI for access to the slide deck. Contact information is provided in the Resources section of this guide.
- Virtual meeting connection between the facilitator(s) and the learners: Multiple learners may gather around a single computer in a shared office or a conference room.

Optional:

- Printed copies *Research Ready* self-study workbook: PDF can be accessed for viewing and printing on LPHI's website. A link is provided in the Resources section of this guide. The information in the workbook is presented in the same order as the slide presentation. Learners may use the workbook to follow along during the training and/or keep as a reference after the training is complete.

Timeline:

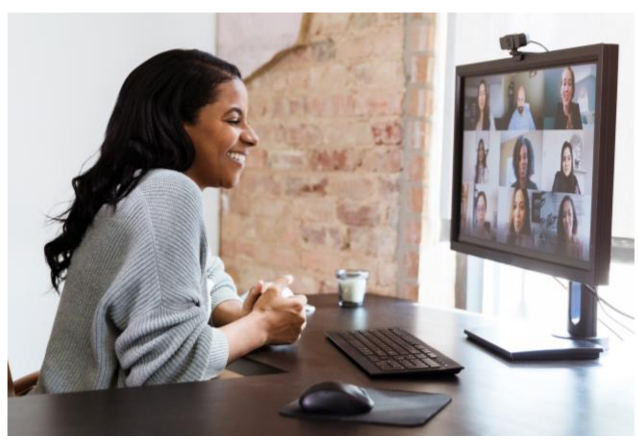
- The virtual training takes approximately 90 minutes to complete in its entirety.
- To mitigate disturbances in clinic schedules and workflows, we recommend scheduling the training during a time that the clinic staff normally gathers (such as a staff meeting) or when staff is present but no patient visits are scheduled. Otherwise, it may be necessary to block clinic schedules to allow all staff to participate simultaneously.

Trainer/Facilitator Role:

- *Optional:* Download the *Research Ready* workbook, print the needed number of copies, and distribute to learners.
- Request the slide deck from LPHI and schedule training time.
- Facilitate the training, including discussion prompts and interactive exercises.
- Track and document learners' completion of the training.

Implementation Steps:

1. Schedule a time and place for the training.
2. Inform staff of the training. In your messaging, include why the training is important and how it relates to their work and to patient care.
3. *Optional:* Distribute *Research Ready* workbooks to staff prior to the training.
4. Lead the training by presenting the slides, explaining the information, leading discussion based on the prompts, and facilitating the interactive exercises.



In-Person Facilitated Training

Materials:

- Printed copies of *Research Ready* self-study workbook: PDF can be accessed for viewing and printing on LPHI's website. A link is provided in the Resources section of this guide. Learners may use the workbook to follow along during the training and/or keep as a reference after the training is complete.
- Space for the training that will accommodate all learners, such as a conference room or break room.

Optional:

- *Research Ready* virtual training slide deck: Contact LPHI for access to the slide deck. Contact information is provided in the Resources section of this guide. The information in the slide presentation is presented in the same order as the workbook. If the technology is available, the slides may be used as a visual aid to the presentation.

Timeline:

- The in-person training takes approximately 90 minutes to complete in its entirety.
- To mitigate disturbances in clinic schedules and workflows, we recommend scheduling the training during a time that the clinic staff normally gathers (such as a staff meeting) or when staff is present but no patient visits are scheduled. Otherwise, it may be necessary to block clinic schedules to allow all staff to participate simultaneously.

Trainer/Facilitator Role:

- Schedule the training.
- Download the *Research Ready* workbook, print the needed number of copies, and distribute to learners.
- *Optional:* Request the slide deck from LPHI.
- Facilitate the training, including discussion prompts and interactive exercises.
- Track and document learners' completion of the training.

Implementation Steps:

1. Schedule the training.
2. Inform staff of the training. In your messaging, include why the training is important and how it relates to their work and to patient care.
3. Distribute *Research Ready* workbooks to staff prior to the training.
4. Lead the training by presenting the and explaining the information in the workbook, leading discussion based on the prompts, and facilitating the interactive exercises.

Training Follow-Up

This section includes recommendations for follow-up after implementing the *Research Ready* training as well as recommendations for future use of the training at your clinic. Use this section of the guide to review how to illicit staff feedback or plan for additional training of your staff.

Post-Training Check-In

Following the implementation of the *Research Ready* training, check-in with staff to collect feedback on their training experience. Your follow-up can include one-on-one conversation, group debrief, or a survey. Consider asking all or some of the following questions:

- What did you learn?
- What information do you think was most important?
- How do you view your role in health research?
- How will you use the information you learned from the training?
- What additional questions do you have about pragmatic research?
- Did the training increased your knowledge of:
    - What research is,
    - The research process,
    - Research integrity,
    - Working with the study team?
- Did the training help you feel more comfortable talking to patients about research?

Additional and Refresher Trainings

After the initial delivery of *Research Ready,* subsequent trainings may be appropriate for the following circumstances:

- Orientation of new staff, especially those who will have an active role in implementing clinic-based research.
- Onboarding of clinic staff who have been added to a site or team that supports research.
- Refresher trainings as needed. Refreshers are recommended immediately before a new study begins or at a regular interval (such as 6 months or 1 year) as need arises and resources allow.

Research Ready Resources

The following *Research Ready* resources are available for use and/or download on LPHI's website. Direct links to each resource are provided after its description. Resources may also be accessed by navigating to the *Research Ready* Training Resources page:
https://lphi.org/research-ready-training-resources/

Workbook

The workbook covers basic research principles as well as tips and strategies for staff members who will be supporting research studies at their workplaces. The workbook is designed to be used for self-guided study or as a compliment to facilitator-lead instruction.
Research Ready: A workbook for Clinic staff implementing research

E-learning

The content from the workbook (including the interactive exercises) is available as an e-learning module which is also intended to be used for self-study.
Research Ready: A training for clinic staff implementing research [e-learning]

Slides

The slides used for facilitated trainings are available by request. E-mail requests may be submitted to LPHItraining@lphi.org.

Guide for Researchers

The researcher guide shares best practices for engaging clinic staff throughout the research process to achieve successful implementation of studies in clinical care settings. The guide is presented in an issue brief format and includes a list of key recommendations as well as sample agendas for recommended meetings with clinic staff.
Research Ready: Guide for engaging clinical staff in research

White Paper

The white paper describes the development, dissemination, and evaluation of the *Research Ready* training. The findings show how participants viewed the training and identified best practices for implementation.
Research Ready: Engaging the clinical workforce as champions of PCOR

Use this QR code to access the *Research Ready* resources page on LPHI's website