How Do We Enable Study Teams to Use All the Available TRIO Resources?

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Virtual Studio via Zoom
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Facilitator: Santosh Basapur, IIT Institute of Design

Attendees:
Denise Voskuil-Marre, Rush University Medical Center (RUMC); Charlene Gamboa, RUMC; Siqi Zhang, RUMC; Chartay Robinson, RUMC; Althera Steenes, ITM; Mahendrakumar Shah, RUMC; Natasha Jolakoski, UChicago; Julian Solway, MD, ITM; Gerald Moose Stacy, ITM; Jessica Shore, Loyola University Medical Center (LUMC); Sonya Redmond-Head, ITM; Jim Callahan, PhD, NorthShore University HealthSystem; Raabiah Ali, Chicago Dept. of Public Health; Sara Polonsky, NorthShore University HealthSystem; Cheryl Lefaiver, Advocate Health Care; Lauren Keenan-Devlin, NorthShore University HealthSystem; Keiichi Sato, ITM; Colleen Fitzgerald, MD, LUMC; Spring Maleckar, UChicago; Rohit Allada, ITM; Sara Serritella, ITM; Genevieve Roth, NorthShore University HealthSystem; Raj Shah, MD, RUMC; Amanda Kass, ITM; and Sherry Robison, ITM.

Summary:
Ashley Lopez, Honest Broker and Research Coordinator for the Trial Recruitment Innovation Office (TRIO) within the Institute for Translational Medicine (ITM), presented the Studio topic, How Do We Enable Study Teams to Use All the Available TRIO Resources? Ashley gave background information and introduced the goal of the office.

Ashley is looking to increase enrollment in research studies by engaging study teams with TRIO.

Design Thinking Methodology was used to solve the problem faced by the TRIO team. Many suggestions based on experiences within different departments and institutions were made.

Top 3 Actions Proposed by the Studio Participants to Ashley Lopez and TRIO Team:

1. Role Clarity - Clearly define what the honest broker is and the services they provide. Using different titles according to audiences can help delineate their role.
2. Conduct Virtual Studios – This will help to investigate institution barriers and solutions. It has also shown to increase participation, due to accessibility.
3. Single Source of Service Offerings/Make Services Clear - Use the ITM communication platforms to serve as the best channel for truth for honest broker services. Align these messages on all ITM institutions’ websites to avoid multiple sources of truth.
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TRIO Studio Problem Description:
Ashley Lopez, Honest Broker and Research Coordinator for the Trial Recruitment Innovation Office (TRIO) within the Institute for Translational Medicine (ITM) explained the goal is to increase enrollment in research studies by engaging study teams with TRIO resources.

Ashley explained the TRIO resources which include TRIO Studios and the Honest Broker. TRIO Studios are where someone can present a research problem and personnel from all six ITM institutions will give suggestions on how to solve the problem. The Honest Broker calls potential research participants to see if they are interested in a study. If they are interested, the Honest Broker will let the study team know so they can follow up with recruitment. The Honest Broker is an unbiased, third-party individual who is not associated with any specific research study. Potential participants are empowered to make decisions regarding their participation and enrollment without the influence of members of a particular study team. In grant year 3, the Honest Brokers at University of Chicago and Rush University Medical Center were able to support recruitment in research studies which resulted in a 27% to 34% increase in recruitment.

The current problems are:

- Not being able to engage research teams
- Difficulty keeping momentum of the research community
- What do study teams need to succeed?

Current efforts of the team include:

- Meeting one-on-one with PIs and study teams
- Distributing flyers
  - Posted throughout UChicago campus
  - Shared with ITM Institutions
  - Shared with Northwestern, UIC, and the City of Chicago Department of Public Health
- OCR/URA Flyer Distribution

Ashley is looking for innovative ways to enable study teams to use all the available TRIO resources.
Main problem for the studio participants to solve:
How do we enable study teams to use all available TRIO resources?

Studio Methodology
Design Science approach was used as part of the TRIO studio to solve the problem.

Design Science Method
We used the Design Science approach with five steps:
1. Created a free form mind map of the problem and identification of issues – Mind Mapping technique
2. Actionable insights were identified
3. Generated ideas to address issues
4. Synthesized solutions from the smaller ideas – Creative integration of smaller ideas led by Design Thinking Expert facilitator was done using white boards.
5. Solutions were proposed and were rated by the team on implement-ability (0-4 scale)
How Do We Enable Study Teams to Use All the Available TRIO Resources?

Design Thinking Based Solutions:
Problem visualized with Insights

The group first discussed the problem and its context yielding the following context diagrams:

Figure 1 Mind Map of Context
How Do We Enable Study Teams to Use All the Available TRIO Resources?

Figure 2 Mind Map of Issues

Figure 3 Mind Map of Insights
How Do We Enable Study Teams to Use All the Available TRIO Resources?

High Level Insights:
Following the context discussions, insights were generated as follows:

<table>
<thead>
<tr>
<th>Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Communication</td>
</tr>
<tr>
<td>02 Clarity in Services</td>
</tr>
<tr>
<td>03 HB/Navigator?</td>
</tr>
<tr>
<td>04 First touch point at each institute?</td>
</tr>
<tr>
<td>05 HB Context is similar to old definition Maybe scope has changed our time?</td>
</tr>
<tr>
<td>06 HB</td>
</tr>
</tbody>
</table>

- Collect and distribute
- No self-interest
- Dispassionate
- Navigator helps the team
- People - Participant
- Navigate people to get someplace
- Big institutes need navigation help
- Full service navigator
- Current role is specialist?
- Chartay/Adrian/Drew
- Conflation - Handoffs smooth

Figure 4 Insights and Ideas Generated During Discussion
How Do We Enable Study Teams to Use All the Available TRIO Resources?

Solutions Generated by Design Science Approach Team:

Five implementable solutions were proposed by the Design Science Team:

1. **Role Clarity** - Clearly define what the honest broker is and the services they provide. Using different titles according to audiences can help delineate their role. For example, using the “honest broker”, “research navigator”, or “research consultant” for the community and “honest broker concierge” for academic institutions can be useful. For further development of the role, there can be a TRIO honest broker and an ITM honest broker concierge. The honest broker concierge would be a full service ITM position which would be a single point of contact for information and request triage.

2. **Conduct Virtual Studios** – This will help to investigate institution barriers and solutions. It has also shown to increase participation, due to accessibility.

3. **Single Source of Service Offerings/Make Services Clear** - Use the ITM communication platforms to serve as the best channel for truth for honest broker services. Align these messages on all ITM institutions’ websites to avoid multiple sources of truth.

4. **Train the Trainer** – Identify and engage institutions research offices to train them about TRIO resources. Engage PIs, study teams and institutions to be open about their recruitment challenges and collaborate to create solutions. Use mixed methods, such as virtual studios and surveys, to gather data about study problems. Use data to assess change and get a clear knowledge of issues and ideas to solve.

5. **Embedded Honest Broker** - For studies with low enrollment or that are facing recruitment challenges, the ITM institutions’ research offices can be the link between study teams and Honest Broker. Currently, the onus is on the study team to reach out for help and research offices may not know the state of recruitment for each study. The honest broker needs to visit each department at their institution to identify “playmakers” and introduce their role. This could help facilitate institutional buy-in.
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Solutions

Role Clarity
- Clearly define Honest Broker role and services
- Use different title according to audience
- Develop into two roles: TRIO Honest Broker and ITM Honest Broker Concierge
- Honest Broker Concierge to be a full service ITM position and serve as a single point of contact for information and request triage

Conduct Virtual Studios
- Use to investigate institution barriers and solutions
- Can increase participation due to accessibility

Single Source of Service Offerings/Make Services Clear
- Use ITM communication platforms as best channel of truth for honest broker services
- Align these messages on all ITM institutions’ website to avoid multiple sources of truth

Train the Trainer
- Identify and engage research offices to train about TRIO resources
- Engage PIs, study teams and institutions to be open on recruitment challenges, collaborate on solutions
- Use mixed methods to gather data
- Use data to assess change and get a clear knowledge of issues and ideas to solve

Embedded Honest Broker
- ITM institutions’ research offices as link between Honest Broker and studies that need recruitment help
- Honest Broker to visit departments at their institute, identify “playmakers” and introduce role - can help with institutional buy-in

Figure 5 Solutions Prioritized for PI

<End of Document. Thank you.>
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Appendix 1.
Slides used by Ashley Lopez

Appendix 2.
Photos of white boards
How Do We Enable Study Teams to Use All the Available TRIO Resources?

Insights

1. Communication
2. Clarity in services
3. HBM Navigator
4. First touch point @ call center
5. HBM context is similar to old definition
6. Full service navigation

Solutions

[Diagram with flowchart and text annotations]

[Additional notes and flowchart elements]
How Do We Enable Study Teams to Use All the Available TRIO Resources?

Solution

1. Embedded HBE @ IRB/OCR
   - Needs to be backend
   - Why?
   - Too much work
   - Coordinating
   - Need for study
   - IRB needs
   - Study team needs

2. The -- Specialist -- make more clear
   - More
   - Need to know

3. Enable PIs to be more reflective on
   - Recruitment
   - Problem
   - Need to know
   - More
   - PI + Research Navigator + Graduates
   - Need
   - Clear ownership

4. Use virtual/studies to
   - Engage more people
   - Hands on/delivered

5. Single source of truth
   - Align messaging + TRIM website
   - Full service end of care
   - Consistency + Clear
   - Remove multiple sources of angst

6. IRB should embed this resource @ ARC
   - IRB/Concierge
   - Get institute buy-in + How?
   - Dept to Dept
   - Playmakers

Prioritized List

1. Embedded HBE @ IRB/OCR
2. Single source of service offerings + Make services clear
3. Role Clarity + IRB/Concierge
4. Virtual studios to investigate institute barriers + solutions
5. Enable PIs + distribution to be open about recruitment problems + solutions creation w/ institute + PI

Reframe:
- CRD is source
- Train new
- Names to point person
About the Institute for Translational Medicine (ITM)

The ITM is a partnership between the University of Chicago and Rush in collaboration with Advocate Health Care, the Illinois Institute of Technology (Illinois Tech), Loyola University Chicago, and NorthShore University HealthSystem that’s fueled by about $35 million in grants from the National Center for Advancing Translational Sciences at the National Institutes of Health through its Clinical and Translational Science Awards (CTSA) Program.

We’re part of a network of more than 55 CTSA Program-supported hubs across the country working to slash the time it takes to develop and share new treatments and health approaches. We work with you and for you to make participating in health research easy, so that together we improve health care for all.

Join the movement and learn more about how we help researchers, physicians, community members, industry, government organizations, and others. Visit us at chicagoitm.org and connect with us on Facebook, Twitter, Instagram, YouTube, and LinkedIn @ChicagoITM.

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