

APRIL 2024

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# COLLECTIVE INSIGHT

## *Newsletter*



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VOLUME 2, ISSUE 2

- Engagement in Action with Amy Eisenstein
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# Engagement in Action



## *Meet Amy Eisenstein!*

Dr. Amy Eisenstein is a Senior Program Officer and Director of Research and Evaluation at [RRF Foundation for Aging](#) in Chicago, Illinois. She's also an engaged researcher with a background in gerontology and public health. This March, we had the opportunity to sit down with Amy to learn about her experiences with engagement and her tips for funders and researchers alike!

### *Amy, how do you define "engagement"?*

For me, "It's a collaborative process. Engagement requires pulling in information from a diverse group of people who have a stake in the outcome of [your] work. This means partnering with end users, such as clients or patients, but also providers, payers, and even policy makers—there are so many required perspectives to have a full understanding of what you need to know."

According to Amy, not all engagement looks alike. "You can have engagement of many people or engagement of just a few people." She emphasized that the size of the group isn't always as important as why you have chosen that size and how meaningfully people are engaged in your process.

“

It is not a 'one size fits all' thing. Engagement is so relevant at all phases of a project. So, I'm hesitant to say when and where. You need to justify the right amount and type of engagement throughout your project.”

”

*Dr. Amy Eisenstein*

### *How did you get your start in "engaged research"?*

Amy found this work after a long history of projects that emphasized the importance of partnerships, and of course, projects that allowed her to work directly with older adults. After receiving her PhD, Amy transitioned to academic research that pulled her further and further away from direct contact with older adults, even though they were the motivators for her work. She had an opportunity to return to those roots when she received a new position as the "Director of Research" for a community-based organization that provided a continuum of care for older adults. On her first tour of the organization, she learned that residents were excited for her new research position. Amy ran towards this opportunity. She sat with residents for a three-hour conversation at which time residents were eager to hear all about research and share their own aging experiences. Amy had a 'lightbulb' moment when residents reported, "there just isn't a whole lot of research done on things important to us."



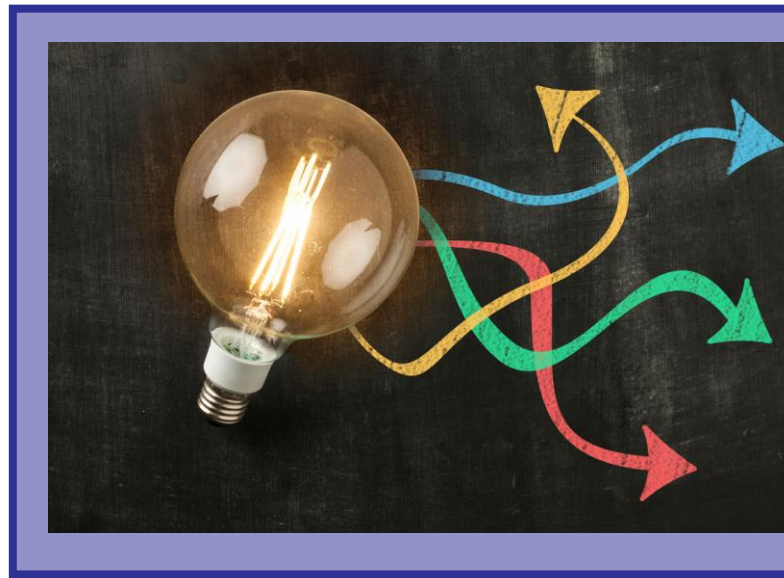
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### *So, what happened from there?*

Amy describes herself as “lucky” to have had the chance to work in a community-based organization that was also invested in research. This allowed older adults to pose a very important question directly to Amy: “**how do we get research to be relevant to me?**” Amy seized this opportunity to work directly with older adults to build a research agenda and to help other researchers gain this valuable insight.

### *But, did it actually work?*

Amy got to see firsthand **how engagement improved her research**. According to Amy, “I’ll never forget the time I was talking to residents about a qualitative study I was doing at a nursing home. I had a bunch of questions, and this one man just said to me, ‘you know, Amy, I think you’re great. I love the stuff that you’re doing, but if you walk into my room and start asking me those questions, I’m gonna make up whatever answer I can to get you out of my room as quick as possible.’ Amy took this new learning in stride and made the changes to account for this honest, yet impactful insight.



### *Wait. Wasn’t this frustrating to hear after all your work?*

Amy acknowledged that engagement can slow you down, feel uncomfortable, and even be riddled with conflict. In fact, she thinks this is why many researchers avoid engagement altogether. But for Amy, engagement is the most direct, successful path to rigorous research.

### *So, what are you doing now?*

Following her work as a Director of Research, Amy joined RRF Foundation for Aging where she is hoping to share her engagement lessons learned to help the Foundation prioritize investments relevant to communities. “**At RRF Foundation, we are funding social change. And if grantee partners are not engaging those most impacted, then proper change isn’t going to occur.**” This is so important since according to Amy, “fundors have limited dollars to make change happen and engagement is essential to prioritizing projects that have a chance to achieve long-lasting impact.”

## **CI Call to Action!**

Are you a resident of Massachusetts passionate about improving quality and access to care? CI is partnering with MassHealth to support the development of a MassHealth Member Advisory Committee (MAC). Interested in getting involved? Email [Haylee@collectinsight.com](mailto:Haylee@collectinsight.com) and learn more [here](#). We’d love to work with you!

## What is your advice for other funders?

“**Look for real partnerships.**” According to Amy, “partnerships are so important. I don’t mean superficial partnerships. I mean partnerships where all sides benefit from the work.” Amy noted that funders can nurture genuine partnerships in many ways, such as paying for food at community meetings and encouraging awardees to equitably compensate their partners. Amy also discussed the value of the **‘Give-Get Grid,’** a tool that assists researchers and their partners to clearly articulate the **mutual benefits** of working together.

## What do you look for in engagement proposals?

The simple answer is “**transparency and accountability**” since successful engagement requires both “time and money.” When she reviews proposals, Amy looks for researchers to demonstrate partnerships over time, including **sustaining partnerships between projects.** “I am looking for that ‘give-get’ relationship and for the partners to have clear understanding and expectations of what each will be providing to the success of the project, and how each will benefit from the work. I also look at the budget, and I look at the letters of support really closely.”

## So proposals are funded, then what?

Once engaged projects are funded, Amy likes to touch base with awardees on a regular basis. Amy said she loves the opportunity to discuss, directly with awardees, the broader ‘give-get’ concept and how it is influencing projects’ day to day activities. “When grantee-partners run into conflicts, I’m often reminding them to check in with their partners to gain perspective.” According to Amy, reminders and **real conversations** about the challenges of continuing engagement despite timelines and resources is important “because people get so focused, and rightfully so, on moving forward. It’s hard to step back and remember the ‘why’ of the work.”

## Example of ‘Give-Get Grid’

Give	Get
What partners will “give” to researchers	What partners will “get” from researchers
What researchers will “give” to partners	What researchers will “get” from partners

*Modified from Southerland J, Behringer B, Slawson DL. Using the Give-Get Grid to Understand Potential Expectations of Engagement in a Community-Academic Partnership. Health Promotion Practice. 2013;14(6):909-917. doi:10.1177/1524839913477657*

## Dr. Eisenstein’s Parting Words

Amy hopes that more people will conduct engaged research or policy work and see the benefits for themselves. “Researchers shouldn’t **do engagement because their funder says its important. They should do it because they believe in it!**” Amy also recommends that people talk to peers who have conducted engaged research for a while because they often find ways to mitigate the challenges and bask in the benefits. Amy recognizes that engagement takes time and money, perhaps more than some researchers or funders are prepared for; however, she encourages folks to strive towards meaningful engagement because “it also leads to more impact than we are used to seeing.”

# Catching Up with Collective Insight

*Spotlight on the Applied Self-Direction 2024 National Self-Direction Conference*



In long-term care, [Self-Direction Service models](#) exist as an alternative to traditional agency delivered care. Self-Direction programs give program participants and families increased choice, control, and responsibility over how they receive their services. [Applied Self-Direction's 2024 National Self-Direction Conference](#), hosted in Baltimore Maryland from March 13-15th, brought together Self-Direction enthusiasts from across the country to discuss program needs, opportunities, and innovations.

## TESTING OUR VALUES: BRINGING SELF-DIRECTION PRINCIPLES TO PROGRAM DESIGN AND EVALUATION

Collective Insight contributed to these discussions in a session held the first day of the conference. Our session, titled **Testing Our Values: Bringing Self-Direction Principles to Program Design and Evaluation**, explored the disconnect between self-direction values of choice and control and the lack of systematic engagement of participants in program design and improvement. Our Session's speakers discussed how to meaningfully bring participants' expertise into all elements of self-direction programs.

### Panelists

- **Julie Reiskin**, Colorado Cross Disability Coalition
- **Dani Comstock**, Colorado Department of Health Care Policy & Financing
- **Julie Foster Hagan**, Louisiana Office for Citizens with Developmental Disabilities
- **Andy Thain**, Wisconsin IRIS Advisory Council and Wisconsin Board for People with Developmental Disabilities

### Discussants

- **Keith Jones**, SoulTouchin' Experiences
- **Erin McGaffigan**, Collective Insight

### Moderator

- **Dani Foster**, Collective Insight

## KEY TAKEAWAYS

Leaders of self-directed programs must 'practice what they preach' by creating and improving self-direction programs **WITH** participants. Individuals using self-directed services must have a 'seat' at the quality design and improvement 'table' alongside program administrators, Financial Management Services (FMS) and Support Brokerage providers, and community advocates. Panelists felt strongly that engagement purpose must inform engagement methods. Panelists also emphasized the need for open communication, a strong feedback loop, and a commitment to make engagement accessible to all communities, including communities that speak languages other than English, rural communities, and those with minimal technology access.