

Advanced Engagement Steering Committee
Meeting Notes
5.19.2023

Attendance: Sophia (Grant Staff); Taylor (Student); Missy (Grant Staff); Erin (Grant Staff); Odette (Funder); Marcus (Funder); Marc (Researcher/Grant Staff), Eddie (Researcher); Tamara (Researcher); Kate (Researcher); Alice (Older Adult); Janet (Older Adult); Beverly (Older Adult); Myrna (Older Adult)

Welcome, Review of Agenda & Materials

Sophia welcomed the group and reviewed the agenda and meeting materials. Several topics were discussed:

Bios and Group Connection

- Several new members were introduced to the Steering Committee. To promote connection between new and old members, we are asking group members to share bio sketches, which grant staff will help create and distribute.

Project Update

- The group was updated on our planned use of a newsletter to replace in-meeting updates so we can spend more time during meetings seeking input on project activities.
- The group was updated on the upcoming U54 seminar, which is a partnership between the Learning Collaborative, the Healthier Black Elders Center, and the Office of Cancer Health Equity and Community Engagement. This presentation will highlight projects that are successfully engaging older adults as advisors of research and the funders who are funding these activities.
- As the group has grown, scheduling demands have grown as well. In order to accommodate, this group will schedule all meetings in advance. Sophia will be sending more information post-meeting via email.

Aging PCOR Self-Assessment Tool

The group discussed the Aging PCOR Self-Assessment tool was, which was created during the first Learning Collaborative project. The tool was created to identify opportunities for Gerontology programs to incorporate engaged research concepts in their programs. The format changed in response to feedback received during the piloting process. The group looked at the current version of the Self-Assessment Checklist and discussed whether this tool should be adapted for funders.

Adapting the Tool for Funders

As the Learning Collaborative strives to shift the research paradigm so that more older adults are seen as research partners, we plan to educate funders since funders assume a major role in setting research priorities and providing the resources necessary to cultivate meaningful engaged research. Our Steering Committee includes a variety of representatives, including funding representatives, to help illuminate the complexities of changing the research environment and shifting the paradigm.

The group discussed the possibility of developing a self-reflection tool for funders to highlight ways funders might support and encourage older adult partnerships. Members identified the challenges to such an approach, including:

- Funding programs and initiatives vary. The goals and missions of funding projects are important to consider and may be difficult to account for in a singular tool. Members noted that creating a resource library or similar tool may account for the diversity in funding initiatives.
- Funders may not respond well to being presented a tool that is as prescriptive as the current checklist, which targets academic leaders. Funders may not be incentivized to meet standards set out by an outside organization.
- The funder community is not fully educated on engagement yet, so a tool may need to come after general education and awareness raising.
- Many funders may feel the onus to incorporate engagement principles falls on researchers. Funders may feel more comfortable directing researchers to engagement resources than undergoing “training” themselves.
- The group also identified a gap in funders’ knowledge and buy-in into engaged research. This may highlight a need for “education” or “training” in order for any tool, whether resource library or checklist, to be meaningfully utilized by funders. Sophia will continue conversations with group members, including funder representatives, to further explore these needs.

Examples of Similar Work

- OpenScience (<https://www.orfg.org/>) is a possible example for this work. OpenScience directs an initiative that helps funders embrace “open science” by educating on best practices in sharing data and publications.
- One funder representative (Amy Eisenstein) was unable to attend the meeting, so Sophia touched base with her about a funder focused checklist independently and updated the group on their conversation. Amy’s funding organization used a checklist for establishing “trust-based philanthropy,” and while they did not use the tool in its entirety, it helped guide important conversations. Based on this experience, this member felt that checklists can be used to raise awareness about engaged research and facilitate discussions about the concrete elements needed to support engaged work. It may be worthwhile to build off our current academic-focused checklist to develop a tool that encourages similar conversations.

Next Steps (Specific to Assessment Tool)

- An important part of building effective education will be establishing our guiding principles and clarifying our message.
- Grantmakers in Aging may be willing to help disseminate a tool or educational materials for funders.

Training and Mentorship

The group was updated on the Learning Collaborative’s training and mentoring program and goals and discussed whether these should be altered for the current project:

- Members felt that our current training and mentoring goals and groups (researchers/students, older adults, and funders) are reflective of the groups' priorities.
- Some other potential groups we can consider for our trainings are:
 - State governments, such as California
 - Research consortiums
- Partners expressed that funders may need education and awareness before being exposed to more intensive training.

Next Steps

- The team will clearly establish the project's guiding principles and validate them with our engagement partners.
- Steering Committee members will complete project Biosketch
- Sophia will reach out to the Steering Committee (funding representatives) to learn more about funder-specific education needs and explore possibilities for developing engagement educational tools.
- Sophia will reach out to Steering Committee (academic representatives) to discuss piloting the most recent version of the academic-focused self-assessment checklist.
- Sophia will email the group regarding long term scheduling and develop this year's meeting calendar.