
10-29-2018

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Recommended Citation

Nease DE Jr, Daly JM, Dickinson LM, Fernald DH, Hahn DL, Levy BT, Michaels LC, Simpson MJ, Westfall JM, Fagnan LJ. Impact of a boot camp translation intervention on self-management support in primary care. *J Patient Cent Res Rev*. 2018;5:256-66. doi: [10.17294/2330-0698.1635](https://doi.org/10.17294/2330-0698.1635)

Published quarterly by Midwest-based health system Advocate Aurora Health and indexed in PubMed Central, the Journal of Patient-Centered Research and Reviews (JPCRR) is an open access, peer-reviewed medical journal focused on disseminating scholarly works devoted to improving patient-centered care practices, health outcomes, and the patient experience.

Impact of a Boot Camp Translation Intervention on Self-Management Support in Primary Care

A Report From the INSTTEPP Trial and Meta-LARC† Consortium*

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Purpose	Self-management support (SMS) is a pillar of the well-established chronic care model and a key component of improving outcomes for patients with chronic illnesses. The Implementing Networks' Self-management Tools Through Engaging Patients and Practices (INSTTEPP) trial sought to determine whether a boot camp translation process could assist small to medium-sized primary care practices with care managers implement SMS tools.
Methods	INSTTEPP used a stepped-wedge design across 16 practices from 4 practice-based research networks over 12 months. Each network completed a 2-month boot camp translation for creating SMS tools with 16 participants (2 patients, a clinician, and a care manager from each of 4 practices) and subsequent implementation. Outcome measures for patients were the Patient Activation Measure (PAM), self-rated health, and Patient Assessment of Chronic Illness Care (PACIC) process-of-care items at baseline, 1 and 2 months. Clinician Support for Patient Activation Measure (CS-PAM) and theory of planned behavior outcomes were assessed at 5 points over 10 months for clinicians and staff.
Results	A total of 297 patients and 89 practice staff and clinicians completed surveys during the study. Over successive 2-month sampling periods, intervention patients experienced greater improvement in PACIC process of care and self-rated health compared to control patients ($P < 0.0001$ and $P = 0.0273$, respectively). PAM ($P = 0.3515$), CS-PAM ($P = 0.7464$), and theory of planned behavior outcomes ($P > 0.10$ for all) were not significantly different.
Conclusions	Significant effects on process of care and self-rated health are evidence that the boot camp translation intervention impacted SMS. A larger trial with a typical 6-month boot camp intervention may show significant effects on other outcomes. (<i>J Patient Cent Res Rev.</i> 2018;5:256-266.)
Keywords	self-management; patient engagement; primary care; boot camp translation; chronic disease

*Implementing Networks Self-management Tools Through Engaging Patients and Practices

†The Meta-Network Learning and Research Center is comprised of Duke Primary Care Research Consortium, Iowa Research Network, Oregon Rural Practice-based Research Network, Quebec Practice-Based Research Network, State Networks of Colorado Ambulatory Practices and Partners, and Wisconsin Research and Education Network.

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With almost one-half of Americans projected to have at least one chronic condition before 2020, it is paramount that the health care system reduce the burden to primary care for disease management by facilitating the development of activated, informed individuals who are proficient in self-management skills.¹ Self-management refers to patients' efforts to engage

in behaviors to manage their chronic illness.² The emphasis on self-management represents a significant cultural shift in health management, and clinicians and staff may lack confidence introducing and promoting self-management support (SMS). In fact, SMS is the area of disease management least often implemented and most challenging to integrate into usual care.^{3,4}

SMS, the efforts of the health care team to promote effective patient engagement in behaviors that positively impact their illness, is increasingly recognized as an important and effective aspect of chronic disease management.⁵⁻⁷ Primary care practices, as the loci of coordination of comprehensive care within the patient-centered medical home model defined by the Agency for Healthcare Research and Quality (AHRQ), are being called on to implement SMS. Care managers within practices that have implemented patient-centered medical home transformation are typically engaged in SMS activities.⁸

Despite the recognized importance of SMS as a core feature of the Chronic Care Model (Improving Chronic Illness Care, Seattle, WA), primary care practices struggle with its implementation,^{9,10} especially small to medium-sized practices with little access to external resources for implementation. Additionally, these practices may find that existing tools are not well-suited to their local settings and patients. In an effort to address this possible barrier, the Implementing Networks' Self-management Tools Through Engaging Patients and Practices (INSTTEPP) trial studied boot camp translation as a method to modify or create locally suited SMS tools.

Boot camp translation was developed by the High Plains Research Network of the University of Colorado School of Medicine (Aurora, CO) and has been applied by others across a number of topics.^{11,12} Boot camp translation translates the language of medical and public health evidence into constructs, messages, and materials that are accessible and actionable by local community members and patients to improve their health. In this paper we report on the main effects to the INSTTEPP intervention of introducing boot camp translation-developed SMS materials on participating practices' patients and staff.

Frequently Used Abbreviations/Acronyms

AHRQ = Agency for Healthcare Research and Quality

BCT = boot camp translation

COMIRB = Colorado Multiple Institutional Review Board

CS-PAM = Clinician Support for Patient Activation Measure

HPRN = High Plains Research Network

INSTTEPP = Implementing Networks Self-management Tools Through Engaging Patients and Practices

IRENE = Iowa Research Network

Meta-LARC = Meta-Network Learning and Research Center

ORPRN = Oregon Rural Practice-based Research Network

PACIC = Patient Assessment of Chronic Illness Care

PAM = Patient Activation Measure

PBRN = practice-based research network

PCMH = patient-centered medical home

SMS = self-management support

SNOCAP = State Networks of Colorado Ambulatory Practices and Partners

WREN = Wisconsin Research and Education Network

METHODS

INSTTEPP was designed as a 12-month stepped-wedge trial to address whether boot camp translation methods could be used to facilitate primary care practices' implementation or adaptation of SMS tools from AHRQ's SMS library¹³ and assess outcomes on processes of care, activation of practice clinicians and staff, activation of patients, and patients' self-rated health. The study was registered at ClinicalTrials.gov (NCT02815020). Participating practice-based research networks (PBRNs) from the Meta-Network Learning and Research Center (Meta-LARC) consortium were SNOCAP, Iowa Research Network (IRENE), Oregon Rural Practice-based Research Network (ORPRN), and Wisconsin Research and Education Network (WREN). SNOCAP served as the lead coordinating PBRN with support from ORPRN. We chose a stepped-wedge study design for INSTTEPP to ensure that all participating practices received the intervention of introducing the boot camp translation-produced SMS tools. Stepped-

wedge study design randomizes the order in which the intervention is received or deployed rather than randomizing whether the intervention is received.¹⁴⁻¹⁶

Recruitment was directed in each of the 4 participating PBRNs toward small to medium-sized practices that likely did not have external support for quality improvement work. However, participating practices were required to have begun implementation of patient-centered medical home features, including the use of a staff member, whether part or full-time, to provide care-manager or health-coaching activities. We solicited letters of support and interest from 6 practices in each PBRN prior to submitting the study proposal to AHRQ, recognizing that practice priorities and capacity for participation could change in the interval period prior to proposal review and ultimate funding. Ultimately, 16 practices, 4 in each

participating network, were successfully recruited from among those who had expressed interest and submitted letters of support. Recruited practices represented a distribution of rural, suburban, and urban practices across the networks encompassing the small to medium practice size. Table 1 presents the characteristics of these practices.

Institutional review board (IRB) approval was granted by the Colorado Multiple Institutional Review Board (COMIRB), with the other investigators' academic IRB's ceding to COMIRB.¹⁷ We sought and received a waiver of documentation of consent. Each participant survey had an approved cover page describing informed consent details, and completion and return of surveys was approved to be implied consent. With two exceptions, individual practices, providers, and staff in participating practices were deemed to not be

Table 1. Characteristics of Participating Practices

Practice	Location	Clinicians / Staff	Ownership	PCMH Recognition	Underserved Patient Population
ORPRN1	Rural	27	Hospital-owned	Other recognition	Yes
ORPRN2	Suburban	60	Totally independent	Other recognition	No
ORPRN3	Rural	18	Totally independent	Other recognition	Yes
ORPRN4	Urban	25	Totally independent	Other recognition	No
WREN1	Rural	126	Physician-owned	None	Yes
WREN2	Urban	53	FQHC	Partial or no recognition	Yes
WREN3	Rural	30	Integrated system	Other advanced primary care redesign	Yes
WREN4	Rural	21	FQHC	NCQA	Yes
IRENE1	Rural	21	Hospital-owned	NCQA	Yes
IRENE2	Urban	10	Integrated system	NCQA	No
IRENE3	Rural	6	Totally independent	None	Yes
IRENE4	Urban	101	Hospital-owned	Partial or no recognition	Yes
SNOCAP1	Suburban	22	Totally independent	NCQA	Yes
SNOCAP2	Rural	18	Hospital-owned	NCQA	Yes
SNOCAP3	Rural	10	Totally independent	NCQA	Yes
SNOCAP4	Suburban	20	Totally independent	NCQA	No

FQHC, Federally Qualified Health Center; IRENE, Iowa Research Network; NCQA, National Committee on Quality Assurance; ORPRN, Oregon Rural Practice-based Research Network; PCMH, patient-centered medical home; SNOCAP, State Networks of Colorado Ambulatory Practices and Partners; WREN, Wisconsin Research and Education Network.

engaged in the research, rather recruitment of survey and interview participants was conducted by PBRN staff in each network. In several instances, individual practices in Iowa and Oregon were required to gain approval through their local IRB. In-depth details of the IRB processes for this project are reported elsewhere in this issue.¹⁷

The method we chose for adapting or developing SMS materials to be implemented in INSTTEPP networks was boot camp translation. Boot camp translation is a method that arises from community-based participatory research and engages stakeholders in a longitudinal process to translate evidence, guidelines, and constructs into locally relevant terminology and products.¹¹ Boot camp translation had been used prior to INSTTEPP for a variety of clinical topics, including cancer prevention, asthma, and hypertension in

Colorado.^{12,18-21} Each participating PBRN hosted a boot camp translation with individuals from each of their network’s 4 participating practices to adapt or develop locally relevant SMS materials at the beginning of their stepped-wedge implementation phase. Given the focus on practice implementation, we designed the boot camp translation groups to include patients, clinicians, and practice staff. A detailed description of the boot camp translations is available elsewhere in this issue.²²

Randomization of stepped-wedge implementation resulted in the following order of implementation: ORPRN, WREN, IRENE, and finally SNOCAP. Steps marched out in 2-month intervals (blocks), with an initial baseline step followed by 4 sequential implementation steps and a final 2-month tail (Table 2). At each step after the initial baseline time block in

Table 2. Study Timeline

	Months 1–2	Months 3–4		Months 5–6			Months 7–8		Months 9–10			Months 11–12			
Implementation steps	Step 0 / baseline	Step 1		Step 2			Step 3		Step 4			Step 5			
ORPRN		boot camp													
WREN				boot camp											
IRENE							boot camp								
SNOCAP									boot camp						
Patient participant survey cohorts*															
ORPRN	1	1	1	2	2	2	3	3	3	4	4	4	5	5	5
WREN	1	1	1	2	2	2	3	3	3	4	4	4	5	5	5
IRENE	1	1	1	2	2	2	3	3	3	4	4	4	5	5	5
SNOCAP	1	1	1	2	2	2	3	3	3	4	4	4	5	5	5
Practice key informant interviews															
ORPRN		baseline		follow-up											
WREN				baseline			follow-up								
IRENE							baseline		follow-up						
SNOCAP									baseline			follow-up			

Unshaded cells indicate that the network’s practices and their patient cohorts were in a “control” condition. Shaded cells indicate when practices and cohorts were considered to be in an “intervention” condition.

*Numbers indicate patient participant cohort for each network.

which all practices were in control phase, 1 PBRN (4 practices) “crossed over” from control to intervention phase until all practices were in intervention phase.¹⁴ The boot camp translations were held sequentially in each network to adapt and design SMS materials and were followed by implementation of those materials in each participating network’s 4 practices. Each step included data collection from patients in cohorts, as shown in Table 2, and practice staff and clinicians across all steps.

Participants and Data Collection

Office Staff Recruitment: Practice staff (nurses and medical assistants) and clinicians were recruited at each of the 16 participating practices to complete 5 surveys, one during each 2-month “step” of the design. We sought to recruit a minimum of 5 clinician/staff participants from each practice to complete the repeated survey consisting of the Clinician Support for Patient Activation Measure (CS-PAM)²³ and a 15-item instrument assessing intent to implement SMS based on the theory of planned behavior.²⁴ Clinician/staff surveys were administered via email invitation through the University of Colorado’s implementation of web-based Research Electronic

Data Capture (REDCap) software, unless practices requested otherwise, in which case paper surveys were used.

Patient Recruitment: For each 2-month step of the design, we recruited 4 patients from each practice to complete 3 serial surveys over a 3-month period. The 3 patient survey waves were slightly longer than the 2-month implementation step in which they were embedded to capture the impact of the practice level work of implementing the self-management tools following the completion of the 2-month boot camp translations. Patients, aged 18 to 70 years, who had at least one chronic disease and were early in the process of working with participating practices’ care management staff were eligible. Coordinators at each PBRN solicited names and contact information from practice staff for eligible patients, and they conducted recruitment phone calls in random order with each eligible patient on a practice’s list until 4 were recruited for the upcoming step. We sought to assess outcomes of patient activation, which has been associated with self-management behavior,²⁵ patients’ perceptions of their care related to SMS, and their own health.

Table 3. Patient Assessment of Chronic Illness Care (PACIC) Items

My health care team members at this practice...

1. Showed me how what I did to take care of myself influenced my chronic condition(s).
2. Asked to talk about my goals in caring for my condition(s).
3. Helped me set specific goals to improve my eating or exercise.
4. Gave me a copy of my treatment plan.
5. Encouraged me to go to a specific group or class to help me cope with my chronic condition.
6. Asked me questions, either directly or on a survey, about my health habits.
7. Thought about my values, beliefs, and traditions when he/she recommended treatments to me.
8. Helped me make a treatment plan that I could carry out in my daily life.
9. Helped me plan ahead so I could take care of my condition(s) or myself even in hard times.

(Participants recorded responses on a 5-point Likert scale ranging from “none of the time” to “always.”)

CDC Healthy Days Core Module question:

Would you say that in general your health is: Excellent (1), Very Good (2), Good (3), Fair (4), or Poor (5)?

CDC, Centers for Disease Control and Prevention.

Therefore, patient surveys consisted of the Patient Activation Measure (PAM),²⁶ 9 items related to self-management from the Patient Assessment of Chronic Illness Care (PACIC),²⁷ as shown in Table 3, and the self-rated health question from the Centers of Disease Control and Prevention's Healthy Days Core Module (https://www.cdc.gov/hrqol/hrqol14_measure.htm). Patient surveys were administered either via the University of Colorado's REDCap system or via mailed paper survey when requested by the patient participant.

In addition to these quantitative surveys of patients and practice clinicians and staff, key informant interviews and observations were conducted with practice staff approximately 1 month after the boot camp translation kickoff retreat and again within about 2 weeks of the final boot camp translation phone call. Details and analysis of this qualitative data are presented in a separate paper published in this issue.²⁸

Statistical Analysis

Descriptive statistics were generated for patient sociodemographic and clinical measures as well as practice characteristics. To understand the potential for confounding due to associations among practice characteristics, bivariate relationships were examined using chi-squared tests and t-tests.

Patient-reported outcomes over time (at 0, 1, and 2 months after enrollment) were analyzed using general linear mixed models that are both longitudinal and hierarchical (PROC MIXED program, SAS Institute Inc., Cary, NC) with random effects for patient and practice. Patient-level variables included age, gender, number of chronic conditions, survey (0, 1, 2), and study group (control vs intervention). At the patient level, study group was determined by when the patient entered the cohort and whether practice was in the control or intervention phase at that time. A survey × group term was included to test for differential trend over time between control and intervention patients. A term for time block (ie, step) was included to adjust for temporal trend.¹⁴

Clinician- and staff-level outcomes also were analyzed using general linear mixed models with random effects for the individual respondent and

the practice. An indicator variable was included for clinician vs staff; other level variables included survey (0, 1, 2, 3, 4, 5), group (time-varying covariate at the clinician/staff level), and a survey × group interaction term to determine if trajectories changed after the practice converted to implementation phase. All available data were used for all analyses. Analyses were performed using SAS Version 9.4 (SAS Institute Inc.).

RESULTS

Patient Participants

Table 4 presents the baseline characteristics of the patients participating during the intervention and control periods. Demographics and prevalence of chronic illness overall are consistent with what was expected from patients entering work with a care manager. Patient participants during intervention cohorts had significantly poorer self-rated health and were significantly more likely to have diabetes (55% vs 39%). Out of a targeted 320 patient participants, 297, or 93%, completed the first of the 3 surveys in each survey wave, with 289 and 281 completing the second and third surveys, respectively, or 5% attrition over the measurement period.

Clinician- and Staff-Level Results

Table 5 presents the survey means and analysis of the CS-PAM and theory of planned behavior measures that were collected from the clinicians and practice staff in participating clinics. There was attrition noted in the participants of these surveys over time. No significant intervention effects were observed.

Patient Outcomes

Table 6 presents the patient participant outcomes after adjustment for age, gender, number of chronic conditions, and time block. There was no significant difference in change over time in PAM scores between intervention and control patients over the 3 surveys (survey × arm: $F(1, 840)=0.87$, $P=0.3515$). There was a significant difference seen in the change for PACIC items; control subjects experienced a slight decline from a mean of the summed responses of 31.32 to 30.20, and intervention subjects reported an increase from 30.20 to 32.32 (survey × arm: $F(1, 797)=16.75$, $P<0.001$). There was a similar significant difference seen in self-reported health

Table 4. Patient Participant Characteristics

Variable	Data set, N	Level	Control, % (n)	Intervention, % (n)	P
Sex	297	Female	64% (96)	57% (83)	0.24
		Male	36% (55)	43% (63)	
Education	294	<HS	2% (3)	6% (9)	0.17
		HS	27% (40)	28% (40)	
		>HS	71% (107)	66% (95)	
Employment	243	Employed	53% (63)	52% (65)	0.15
		Not employed	7% (8)	14% (17)	
		Retired	40% (48)	34% (42)	
Health	293	Exc/VG/G	66% (99)	52% (75)	0.01
		Fair/Poor	34% (50)	48% (69)	
Chronic (Yes)					
Diabetes	296		39% (59)	55% (81)	0.01
Arthritis	296		36% (54)	40% (59)	0.43
High BP	296		63% (94)	62% (90)	0.86
Heart disease	296		16% (24)	11% (16)	0.20
Lung disease	296		9% (14)	12% (18)	0.41
Depression	296		43% (64)	45% (65)	0.75
Chronic pain	296		23% (35)	32% (47)	0.09
Heart failure	296		2% (3)	5% (7)	0.18
Chronic (other)	296		29% (43)	27% (40)	0.81
Chronic (none)	296		5% (7)	5% (8)	0.75

BP, blood pressure; Exc/G/VG, excellent/good/very good; HS, high school diploma.

over the 3 surveys. Control participants reported virtually no change in self-reported health, from 3.17 to 3.16, whereas intervention participants reported a change from 3.35 to 3.1 (survey \times arm: $F(1, 832)=4.89, P=0.0273$), with lower scores indicating better health. Healthy days trajectories did not differ significantly over time between groups (survey \times group: $F(1, 833)=0.08, P=0.7763$).

DISCUSSION

Self-management support is a critical component of care to improve chronic disease outcomes; however, engaging patients in key elements such as goal setting and action planning challenge many practices. The INSTTEPP project utilized the boot camp translation method to engage clinicians, staff, and their patients in

a process of co-learning and co-creation of 4 network-specific SMS tools across 4 PBRNs and 16 small to medium-sized primary care practices. Each boot camp translation group learned the principles of SMS and evaluated the existing tools in the AHRQ library. As reported in a companion paper, through the boot camp translation process, each PBRN created its own SMS tool that represented its unique perspective on the key elements of SMS.²²

While activation as measured by PAM did not show greater improvement among intervention patients, process of care as measured by 9 items from the PACIC did show a significantly greater amount of improvement, as did self-rated health. Interestingly, no significant changes were observed in clinician and

Table 5. Clinician and Staff Participant Outcome Means and Comparisons

Measure	Survey (N)	Controls	Intervention	Differential Intervention Effect
CS-PAM	1 (89)	81.89		
	2 (67)	81.96	80.50	
	3 (65)	82.04	81.03	
	4 (61)	82.11	81.56	
	5 (55)		82.09	F(1, 317)=0.10, P=0.7464
Theory of planned behavior				
Knowledge	1 (89)	0.54		
	2 (67)	0.61	0.57	
	3 (65)	0.67	0.66	
	4 (61)	0.74	0.75	
	5 (55)		0.85	F(1, 314)=0.25, P=0.6182
Affective	1 (89)	1.69		
	2 (67)	1.74	1.45	
	3 (65)	1.79	1.57	
	4 (61)	1.83	1.70	
	5 (55)		1.83	F(1, 313)=0.54, P=0.4630
Intention 1	1 (89)	2.28		
	2 (67)	2.24	2.01	
	3 (65)	2.20	2.10	
	4 (61)	2.15	2.19	
	5 (55)		2.28	F(1, 313)=1.50, P=0.2213
Intention 2	1 (89)	2.22		
	2 (67)	2.14	1.92	
	3 (65)	2.07	2.01	
	4 (61)	1.99	2.09	
	5 (55)		2.18	F(1, 308)=2.04, P=0.1542
Perception	1 (89)	1.51		
	2 (67)	1.54	1.31	
	3 (65)	1.57	1.39	
	4 (61)	1.59	1.47	
	5 (55)		1.62	F(1, 314)=0.29, P=0.5882
Social	1 (89)	2.00		
	2 (67)	2.05	1.98	
	3 (65)	2.09	2.04	
	4 (61)	2.14	2.11	
	5 (55)		2.17	F(1, 315)=0.03, P=0.8637

CS-PAM, Clinician Support for Patient Activation Measure.

Table 6. Patient Outcomes Adjusted for Age, Gender, Number of Chronic Conditions, and Time Block

Measure	Survey	Controls	Intervention	Differential Intervention Effect
Patient Activation Measure	1	66.72	66.08	F(1, 840)=0.87, P=0.3515
	2	66.79	66.72	
	3	66.86	67.36	
Process of care (per PACIC)	1	31.32	30.20	F(1, 797)=16.75, P<0.0001
	2	30.76	31.25	
	3	30.20	32.32	
Self-reported health*	1	3.17	3.35	F(1, 832)=4.89, P=0.0273
	2	3.16	3.25	
	3	3.16	3.16	

*Lower score is better so declining scores indicate improvement.

PACIC, Patient Assessment of Chronic Illness Care.

staff measures as they transitioned from control to intervention steps, although there were slight trends in the expected direction.

The changes seen in intervention patient participants' PACIC scores and self-rated health compared to controls are an important sign of the impact of the boot camp translation process and the efforts to implement the SMS tools designed in the boot camp groups. The success of boot camp translation in tailoring SMS to local settings reflects findings reported by Taylor et al.²⁹ Through every implementation step in each PBRN, new enrolled patient participants were being engaged in their practice's new efforts at SMS. Over the 3 months of patient participation, intervention patients experienced subtle improvement in their practices' approach to SMS, reflected in their ratings of PACIC items that measure goal setting and treatment planning. Similarly, intervention patients' ratings of their own health showed improvement over the 3 months of measurement.

Limitations

A significant limitation of the INSTTEPP study was the extremely short time frame of 12 months for the actual study. This impacted the boot camp translation process, which was abbreviated from a typical 6- to 9-month process to a much shorter 2-month one.

Additionally, the observation periods were relatively short, especially for those networks and practices that entered the implementation phase later in the project. Another limitation was the high dropout rate among clinician and staff participants. This clearly impacted our ability to measure changes in their attitudes and behaviors around SMS. Finally, we were struck by our inability to detect a significant change in the PAM responses. There is limited existing data on sensitivity to change for PAM,^{25,30} and while it clearly is associated with key outcomes cross-sectionally, across our moderately sized sample we did not see changes that paralleled changes in our other outcomes. The small significant changes we did observe and the lack of significant change in PAM could be due to the brief 3-month observation period for our patient participants.

CONCLUSIONS

In summary, despite a relatively constrained implementation and study period, we were able to demonstrate significant improvements in key patient outcomes as a result of applying the engagement-based boot camp translation method of translating key concepts and messages of self-management support for small to medium-sized primary care practices and their patients. These promising results need replication in a larger and longer trial.

Patient-Friendly Recap

- Self-management, or a patient's own steps to manage his or her chronic illness, is an important aspect of improving overall care.
- The authors tested a process called boot camp translation that brought patients, their clinicians, and primary care practices together to design tools to help patients improve their self-management.
- Patients in participating practices reported improvements in their own health and in the care provided by their practices.
- These results should inform larger studies testing how patient input to design tools and care can improve patient health.

Acknowledgments

Mayo Clinic Health System (Tomah, WI); Milwaukee Health Services, Inc. (Milwaukee, WI); Northlakes Community Clinic (Iron River, WI); Richland Medical Center (Richland Center, WI); Family Medical Group, NE, P.C. (Portland, OR); Northwest Primary Care Sellwood Clinic (Portland, OR); Springfield Family Physicians (Springfield, OR); Winding Waters Clinic (Enterprise, OR); Akron Mercy Medical Clinic (Akron, IA); Red Haw Family Medical Center, P.C. (Chariton, IA); Family Medicine Clinic, University of Iowa Hospitals and Clinics (Iowa City, IA); Family Care Southwest (Littleton, CO); MidValley Family Practice (Basalt, CO); Westminster Medical Clinic (Westminster, CO); Yuma Clinic, (Yuma, CO).

Author Contributions

Study design: Nease, Hahn, Levy, Westfall, Fagnan. Data acquisition or analysis: Nease, Dickinson, Michaels. Manuscript drafting: Nease, Dickinson. Critical revision: all authors.

Conflicts of Interest

None.

Funding Sources

This research was funded by Agency for Healthcare Research and Quality (AHRQ) grant 1R18HS022491-01. Infrastructure support (ie, Meta-LARC) was funded by AHRQ grant IP30HS021639-01.

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