Pathways for Successful Stakeholder Engagement in Research

Meaningful stakeholder engagement provides a foundation for sustainability and shared leadership in the project. In addition, it helps to ensure that research is grounded in lived experience so that results are valuable to the individuals intended to benefit from the programs.

In order to ensure that stakeholders are able to stay engaged in the PCORI project team in ways that are meaningful to all parties, agency representatives have put together a set of recommended pathways for engagement. These pathways will be shaped differently at each agency according to individual organization culture and practice, but adopting a common set of pathways can help create a common or shared experience for stakeholders across the sites. It will also help stakeholders to understand their role and how it might fluctuate over time.

Stakeholder lifecycle

The research project can be broken into five major periods of time, as they relate to the involvement of stakeholders.

- o Pre-planning: During this phase, sites made decisions on which stakeholders to engage in the project, and how they will be incorporated from an agency perspective.
- o Planning and launch: Stakeholders are heavily involved during this period, providing input into the final design of the study, questions, and other details that improve the quality of experience for research participants and the quality of the data being collected.
- o Data collection: Stakeholders have minimal involvement during this phase, when research staff are primarily engaged in recruitment and data collection. Despite minimal involvement, there will likely be some opportunity for input around recruitment or problem solving particular issues that come up during data collection. See recommendations below.
- o Data analysis and interpretation: Stakeholders will play a key role in interpreting findings by providing information about context and nuances that are important for the community.
- o Dissemination: Stakeholders are critical during this phase, providing input into appropriate dissemination channels in their communities and organizations.
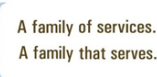
Stakeholder identification

Agency partners should develop a common set of criteria for stakeholders before invitations are made. In addition to these common elements, each agency will likely also have organization-specific criteria that they will consider.

Common criteria suggestions
- Stakeholders should already have connections to the agency if possible. If they do not have existing relationships, it may be difficult to retain them over time.
- Stakeholders should also have connections to the community that is the subject of the research. This allows them to provide high quality input based on their lived experience.

Consider: conducting interviews with potential stakeholders as part of the identification process. Sites can determine individual stakeholders' goals for participation, and build this into their interactions over the life of the project. If an agency has longstanding relationships with community stakeholders, it may also consider allowing those stakeholders to self-select their participation through whatever mechanisms already exist for enlisting community participation.

> Example*: The stakeholders on the PCORI project all have existing relationships with their organizations, whether through volunteer work, board membership, or other areas of connection. They also all have connections to older adult communities, whether by virtue of where they live, their age, or through their professional or personal experiences.*

Onboarding: Stakeholders may change over the life of the project. Individuals invited to participate may not have the opportunity to be involved in the formation of the project, and so may need an orientation. Agency partners should consider creating an onboarding process and document to orient stakeholders to the overall project: its goals, history, timeline, their role, and the role of the agency. Setting expectations for each party is an early step that can help to prevent confusion or other issues throughout the project.

Recommended pathways for engagement

The critical factor in creating pathways for engagement is relationship development. Stakeholders who are familiar with and connected to both the organization and the individuals involved in the project will have an easier time staying engaged throughout the duration of the project.

Early face to face interactions. Interactions in person are critical for long term relationship building, especially when the majority of communications take place over the phone or email. People feel more comfortable sharing, disagreeing, and voicing their opinions when they know and trust the other members of the group.

> Example: *The PCORI project held an in-person kick-off meeting at the beginning of the project, and holds annual gatherings for the full project team. Site visits took place in year one, and engagement visits are scheduled for year three.*

Regular opportunities for connections at the agency level. This can take the form of regularly scheduled in-person meetings, informal opportunities to drop in, and connections via email and phone. These opportunities should be embedded into the culture of the agency, so that stakeholders and staff are both aware of and encourage them.

Build in engagement opportunities throughout stakeholder lifecycle. Thinking ahead of pathways for engaging stakeholders in each of the stages of the research may help them to stay connected for the long term.

> Data collection phase: Stakeholders have minimal opportunity for involvement during the data collection phase, which is the longest phase of the research project. Consider creating a role for stakeholders during the data collection phase that allows them to provide feedback on client/research participant interaction and the ongoing recruitment process. While stakeholders typically should not be engaged in the day-to-day operations of data collection, broader questions and issues that rise to the level of a full team discussion could have a clear stakeholder component. This could take the form of a standing agenda item on monthly all-team meetings, to be utilized as needed.

> Engagement during the project's final phases: As the project wraps up, there are opportunities for all team members to reflect on their contributions to the project. This may take place at the agency level, or with the full team. In addition, stakeholders can make meaningful contributions to dissemination. Plan ahead to engage them in this phase of the project, paying attention to opportunities to share results with their professional and social networks, as well as the communities that took part in the research.

> Engagement beyond the research project: Keeping stakeholders engaged over the long term may involve creating opportunities outside of the research project. These kinds of opportunities can help stakeholders find new ways for meaningful involvement, while the agency benefits from the participation of well-informed community representatives.

> Examples
> - o *JFS invited stakeholders to provide input on program design for new or related programs.*
> - o *Alpert brought stakeholders to speak with the agency's PQI committee about human subjects research.*

Evaluation of efforts. While informal opportunities exist to provide feedback on process and the value of participation, a more formal evaluation of engagement efforts may provide meaningful information for both the project and the agencies. The project team should consider conducting a survey of stakeholders and project team members to gain greater understanding of the level of engagement that stakeholders feel. If the survey is conducted during the course of the project, there should be an accompanying commitment to address any gaps that surface.

Peer-to-peer project stakeholder engagement pathways

- Site level:
    - Scheduled, in person meetings onsite on a quarterly or bi-monthly basis
    - Ad hoc engagement (i.e. stakeholder welcome to stop by or discuss the project at any time)
    - Intentional relationship development between research staff and stakeholders for informal engagement
- Project level:
    - Monthly conference call for all members of the project team
    - Annual in person gathering
    - Email distribution list where all information from the project is shared
    - Weekly notes from research staff calls shared with distribution list

Barriers and Challenges to Consider

- o Working across sites necessitates that a majority of communication take place via conference call or email. Several members of the team find these modes of communication to be challenging. Consider technology support that allows for virtual meetings or video-supported meetings to enhance these communication channels.
- o Engagement opportunities must make sense and provide value to all who participate. Monthly check-ins where little information is provided may not provide the level of engagement desired by participants. Too few check-ins are also a problem. Look for an appropriate balance in scheduling these all-team meetings.
- o Multiple communications pathways should be created, recognizing that individuals have different comfort levels with written communications and phone calls.