Insights from Researchers and Stakeholders on **Defining Roles and Responsibilities**
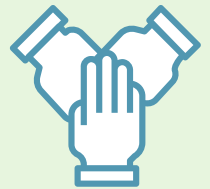
Clearly defining roles and responsibilities for all team members helps teams work well together. Clear roles and responsibilities allow all team members to understand what others are working on, when activities will occur, when to depend on or interact with others, and when to work independently. In addition, matching each team member's roles and responsibilities with their skills, experience, and knowledge can help make a research study stronger.

This resource presents insights from researchers and stakeholders from PCORI-funded teams – in their own words – about how they have successfully defined roles and responsibilities within their teams. Their insights, which are organized around three key messages, illustrate why and how to define roles and responsibilities in a multi-stakeholder team.

1 **Successful multi-stakeholder teams work collaboratively to build structures to anchor their day-to-day interactions.** All team members should contribute to these structures, including roles, responsibilities, and team norms, and revisit them regularly throughout the study.

Working collaboratively on defining roles and responsibilities of stakeholders started very early in the planning process for [the study]. Thinking strategically and comprehensively, stakeholders that would be touched during the course of the study as well as those impacted after the study ended, were identified. We tried to think "out-of-the-box" along with considering PCORI's engagement rubric and stakeholder partners that would be helpful in all phases of the study, i.e., planning, implementation, analysis, and results dissemination. The result was a large and diverse group of stakeholders that became partners. Some were patients and caregivers, healthcare providers and subject matter experts identified as important for the planning and implementation phases while stakeholders such as payers and national advocacy groups would be most critical in the analysis and results dissemination phases.

– Comment submitted collaboratively by members of a PCORI-funded research team

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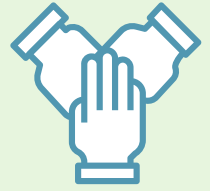
Among stakeholders it was important for us to have a set of mutually-created guidelines for our groups going forward over the life of the five-year trial. Each stakeholder group (patient/family, MD, Allied Health, Payer/policymaker) spent about an hour in our first meeting getting to know one another, brainstorming things that drive us nuts when we work in teams at our usual workplaces, and coming up with a list of guidelines we might use avoid those headaches. Each group has a different makeup, so the guidelines were slightly different. We discussed them and voted on them within our groups. A member typed them up for the next meetings and we all signed on our collective guidelines.

— **Engagement Lead**

What worked well from my perspective was holding frequent meetings at the beginning and making certain we talk about how things would go, together…Now that meetings are less frequent, we try to keep people engaged through regular email and newsletter communication. Selecting people for the team who have the range of necessary skills for the job that has to be done is important. The matching the skills against the necessary tasks is the next step necessary for success.

— **PCORI-funded Researcher**

From our first meeting, it was clear that our facilitator was sensitive to the varying levels of education, life experience, and wisdom within our diverse group…I think that our meeting facilitator's communication style has made the contributions of our team much richer. It allowed each of us as members to reflect thoughtfully on one another's comments so that the wisdom we generated as a group was truly reflective of the diversity of perspectives that informed the broader conclusions that we came to in our group process. This made each of our specific roles and strengths much clearer as the meetings progressed.

— **Patient/Consumer**

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(2) **Roles and responsibilities should be clearly defined** for every activity or task, considering differences in experience and knowledge, and reaffirming the value of every team member.

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The lead researchers did a fabulous job including all of us. I felt very valued from the first meeting I walked in to today. The researchers have made sure that stakeholders and patients on the project can do as much or as little as they desired based on their expertise and how it is needed for the project. They did a really good job using all of our skills and pulling from each of us what they needed without overusing one person.

– Advocacy Organization Representative

To accommodate varying patient preferences, it is suggested that patients and other stakeholders should have the opportunity to be involved in structured roles independently throughout the continuum of engagement (consultation, involvement, and shared leadership) rather than encouraging all patients to seek shared leadership. This approach allows patients to adjust the depth of their involvement over time to fit their own needs.

– PCORI-funded Researcher

Our team is a team of experts. I am an expert on my own diagnosis and experience with the mental health system. The other peer support specialist team members are experts on their organizations and how peer services are delivered and received. They are also experts in their own experiences receiving mental health services. The research scientists are experts at research. Together, we share and respect each other's expertise, and make decisions collaboratively.

– Patient/Consumer

Research team members discuss what the goals of the research are, and each identifies the strengths they bring to the various goals for the study. One team member might be great with people and interviewing. Another might have tremendous skill at organizing data and emerging themes. Working collaboratively means flexibility.

– Patient/Consumer

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3 **Flexibility is an important part** of defining roles and responsibilities.

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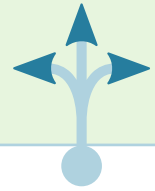
While roles might be defined, flexibility must remain because when working with human beings, things can be vastly different than predicted. Thus, the person that might have been identified to do one thing, might have to adjust to doing something different because of a unique individual involved in the study.

– Patient/Consumer

I would suggest that the defined roles be discussed and clarified, but that even when roles are well-defined, flexibility must remain, so that if someone can't be available for something, another can step in for them.

– Patient/Consumer

Team members take time to get to know each other prior to the start of the research. Bringing lived experience into the mix created opportunities to partner a researcher with a peer support specialist. However, there was flexibility in that if a peer support specialist had fantastic data collection skills and the researcher made a strong connection with the individuals in the study, then there was flexibility to support the best use of team members.

– Patient/Consumer

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