

**Engaging patients and other healthcare stakeholders in research can make research findings more patient centered, relevant, and useful.**

However, being part of a multi-stakeholder research team is a new experience for many. Team leaders must take steps to facilitate and ensure the engagement of stakeholders as full members of the research team.

This checklist identifies a series of organizational, logistical, and content-related needs that, when met, can promote stakeholders' full participation. Stakeholder engagement is an ongoing process. As such, this checklist is not meant to be an exhaustive list of the steps needed to prepare stakeholders for partnerships, but rather should serve as a basic framework for getting started. Consider using this checklist early—for example, in the planning stage of your research project—to uncover and address any obstacles to stakeholder partnership. If time or resources are limited, focus on the needs that are most relevant and achievable for your team. Researchers should ask stakeholder partners about any additional needs that are not captured below.

### Logistical Needs

- Transportation, parking, public transit passes, language translation, childcare resources or respite for caregivers to facilitate participation in meetings and other activities
- Access to meeting locations for those with physical limitations, and any other accommodations, such as videoconferencing, which may be needed to support full participation
- Access to technology to participate in team events, such as a loaner tablet with videoconferencing software
- Training in any software that will be used on the project (e.g., SPSS, STATA, NVivo, videoconferencing)
- Access to all appropriate files, ability to navigate online file storage, and an understanding of security requirements
- Protection of stakeholder confidentiality or privacy (e.g., how stakeholders' individual healthcare experiences will be protected)
- Flexibility when scheduling meeting times and locations to ensure maximum stakeholder participation

### Content and Other Needs

- Stakeholder involvement in defining the purpose and scope of the study
- [Research Fundamentals](#) training for all team members to help everyone gain familiarity with the terms and concepts used in research; being familiar with research terms and concepts—and able to fully participate—can help stakeholders feel prepared, valued, and appreciated
- Consideration of how to best communicate about research study design issues using plain language
- Plans for how to facilitate meetings so that all perspectives are heard and addressed (for guidance, see the [Enabling Multiple Points of View](#) webpage)
- Clear definitions of roles and responsibilities for all team members (for guidance, see the [Defining Roles and Responsibilities](#) webpage)
- Guidelines or agreements in place to help manage conflict (for guidance, see the [Negotiating Conflict](#) webpage)

### Organizational Supports<sup>1</sup>

- Leadership support (e.g., financial, logistical, resources) for patient-centered outcomes research (PCOR) and the involvement of stakeholders in research
- Policies about bias and discrimination that cover stakeholders
- Ability for non-employee stakeholders to use the organization's resources—for example, give stakeholders access to or allow them to reserve meeting space for team events, use the organization's videoconferencing services, or access electronic files stored by the organization
- Compensation for stakeholders for their efforts on the proposal prior to funding and throughout the study
- Policies and systems to reimburse non-employees for parking, travel, childcare, conference registration, and other study-related expenses
- Institutional Review Board (IRB) recognition of stakeholders as members of research teams

<sup>1</sup> Organizational supports may not always be within the research team's control and will take time to build and maintain. However, organizational support for multi-stakeholder research is essential to reap the benefits. For additional information on building organizational support for PCOR, see the [Generating Organizational Support for Patient-Centered Outcomes Research Tip Sheet](#).