

### What You Need to Complete This Activity

- **A facilitator:** The facilitator should guide the discussion and keep the activity on track by following the directions in the Activity Guide and Worksheet. Anyone on the team can play the facilitator role.
- **A worksheet note taker:** The note taker should capture the team members' ideas throughout the discussion in Steps 2 and 3 in the worksheet, on a flipchart, or on a (virtual) whiteboard.
- **A copy of the worksheet** for each team member.

Your team will need about 1 hour to complete this activity, depending on the number of team members who take part. Your team can meet in person, or virtually, following the step-by-step directions.

### Activity Goal

**A**fter completing this activity and **worksheet**, your team will have a list of ways to work together that are reflective of stakeholders' needs and preferences for contributing to the research study. The team will identify ways of meeting and working together that seek and capture the views, experiences, and preferences of all stakeholders, reinforcing their role as equal partners on the study.

### Who Should Participate and When?

This activity is best done by the entire team. It is important that as many of the team members as possible—including stakeholders—be present, participate, and identify barriers they might face. It is valuable to conduct the activity early in the team's formation; however, it may be difficult for stakeholders to share challenges if trust has not been established among team members. Therefore, it may be useful to revisit this activity at several points throughout the research study when stakeholders feel less vulnerable and more comfortable discussing barriers to engagement with the entire team. Additionally, new barriers may arise over time as the study progresses and stakeholders feel more confident participating in the research process.

### Why This Matters

Engaging stakeholders as equal partners in research is a new and different way of doing research. Research institutions, researchers, and stakeholders may experience challenges as they implement this novel approach to research. Asking stakeholders what they need to successfully participate in team meetings and activities—and how they prefer to participate—is one of the first steps to addressing barriers to engagement. Research teams can then use this information to establish processes that allow all stakeholders to contribute to team discussions, ensuring that all stakeholders' voices are heard and valued. When stakeholders—and other team members—feel heard and valued, they are more likely to contribute and stay engaged in the research study. Meaningful engagement of all team members, including stakeholders, is essential to creating an effective team.

### Step-by-Step Directions

- 1 Agree to complete this activity and worksheet as a group and schedule a time to work together.**
- 2 Assign the roles of facilitator and note taker.** The facilitator and note taker should meet briefly to confirm what each will do during the meeting.
- 3 If the team has not worked together before, start with introductions so each person can share why they are involved in the project before starting the activity.**
- 4 The facilitator should start the activity by reviewing the activity goal and telling the team how much time each activity will take.** The facilitator should create pairs of team members, ideally pairing team members who do not know each other well.
- 5 The facilitator introduces the worksheet and states the time allotted for each step.** In Step 1, pairs of teams will discuss a few questions about their preferences to stay involved in the study; this will take about 15 minutes. In Step 2, each pair will report out to the larger group for about 15 minutes. In Step 3, the team will prioritize ideas and identify next steps to keep stakeholders involved. Step 3 will take about 30 minutes.

### Additional Guidance for the Facilitator

- **This activity is about helping all team members stay engaged in the study.** This includes conducting meetings and activities to ensure each person's perspectives and experiences are sought and captured. Remind the group that all team members can help stakeholders stay engaged in the study in meaningful ways. Team members should avoid using jargon and acronyms.
- **This activity is an opportunity for the facilitator and team to establish trust, value all voices, and practice inclusive behaviors** (i.e., show respect for all team members, allow each team member to fully share their idea before responding). As trust grows, stakeholders may feel more comfortable sharing challenges to engagement.
- **Stakeholders may have different needs and preferences for how they engage with the team.** Be sure to acknowledge and support these differences. For example, it may be helpful to offer team members an opportunity to provide input anonymously or individually before completing the activity.
- **Encourage creativity.** Stakeholders may have ideas that seem “out of the box.” Although some team members may be hesitant to try new ways to meet or gather input, it may be helpful to try something new and then check in to see how it is working.
- **Be sure to close the loop and follow through.** This activity requires a commitment by leaders on the team to follow through with the ideas that are prioritized in Step 3. Decide who will communicate and implement these ideas within the team, and how often the team will discuss any new barriers and ideas. In addition, it may be necessary to communicate to the team that, in some cases, if the ideas to address barriers to engagement are more resource intensive (e.g., providing tablets or laptops), the team leader may need to talk with leadership about securing additional resources before committing to the idea.

### Step 1 • Questions for Pairs (15 minutes)

In pairs assigned by the facilitator, each person spends about two minutes answering each question. Their partner records key points below.

- 1 What would make it difficult for you to meet virtually or in person with the team?**  
(For example, access to virtual meeting technology, lack of transportation, work schedule)
- 2 What would make it easier for you to meet virtually or in person with the team?**  
(For example, additional training, evening or weekend meetings, childcare services)
- 3 Besides meeting in person or virtually as a team, what other activities or strategies could the team use to make sure everyone has a way to contribute that works for them?** (For example, invite all team members to provide written input in a shared document or survey, or take part in short virtual check-ins with a small group or one-on-one)

**Pairs record potential strategies for engaging all team members to share with the rest of the team.**



# Strategies to Support Stakeholder Engagement

## ACTIVITY GUIDE WITH WORKSHEET

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### Step 2 • Sharing from Pairs to Team (15 minutes)

Each pair shares what they learned with the full team in 2-3 minutes. The facilitator should ask clarifying follow-up questions to draw out detailed responses and note potential strategies for engaging all team members on a flipchart or (virtual) whiteboard (10 minutes). From this discussion, additional activities and strategies may surface that can help stakeholders meet and work together, and the facilitator should be sure to acknowledge them.

*You may record notes here:*



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## ACTIVITY GUIDE WITH WORKSHEET

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### Step 3 • Team Brainstorm on Next Steps for Stakeholder Engagement (30 minutes)

Using the list generated above, the team decides together which ideas to prioritize to help all team members take part in the study. Note when and how often each activity might take place. For example, decide how the team will collect feedback from stakeholders who are unable to attend a meeting, or how to structure meetings to ensure that all team members receive the support they need to contribute.

*You may record notes here:*