



Identifying & Engaging Stakeholders in Community-Engaged Research

This document provides guidance for research partnerships about identifying, approaching, and engaging community stakeholders in community-academic research partnerships.

Related Directory Resource: [Guidance for Forming/Supporting Community Advisory Board](#)



Internal reflection before engagement

- Why engage? How will it add to research success/outcomes?
- Who to engage? Who is impacted? Who can make change?
- How to engage? Extent, type, long/short term. Needed resources
- What info to share about yourself/work? What info to ask from stakeholders?
- When to engage? Pre/during/post
- Why stakeholders may NOT want to engage?



How will research benefit stakeholders?

- Provide needed service for clients/patients? Sustainable?
- Raise capacity of stakeholder? staff? community?
- Valuable to stakeholder practice/operations?
- Help researchers/others better understand stakeholder, community, clients?
- Bring resources/funding to CBO? community?
- Negative/inconvenient impacts of research? Why wouldn't stakeholders want to engage in research?



Identifying stakeholders

'Representation'

- Perspective, skill, knowledge, geography, race/ethnicity
- Organization vs individual residents/members/patients. Do org staff represent org, their own community, community org serves, themselves, all?
- Leadership vs mid or frontline staff- who needs to support/sign off? Who will do the work?
- Embedded and well respected in community. How can you determine?

Considerations

- Who will be impacted by the research or findings? Who has power to make change based on findings?
- Who can 'speak for' community? How many people are needed to 'speak for' the community?
Avoid tokenism
- Who has time, resources, skills, flexibility to attend meetings, review docs, make decisions, etc.?
- What if certain neighborhoods or communities are more outspoken, have greater organizing skills, are more comfortable negotiating with potential partners, or are more willing? Do research partners have the responsibility to seek participation from all relevant communities and not just with groups who are the most outspoken or easiest to work with?
- Who has influence in the community?



Identifying stakeholders

- Multiple stakeholders (public agencies, healthcare providers, payers, policy makers, grassroots, patients/caregivers), interactions
 - Will likely engage different types of stakeholders at different times & in different roles in research project. E.g. Caregivers may contribute lived experience about challenges in caring for someone with specific health conditions. Healthcare providers may contribute practical info about potential challenges and solutions related to data collection or recruitment. City staff or payers may be in decision making positions to act on findings during project's dissemination phase.
 - Who feels comfortable with who? Who has conflict with who?
- Experienced stakeholders- do they become 'professionalized' and disconnected from perspectives of community members less experienced with research collaboration?
- Over-extended stakeholders- individuals with most community knowledge, history, connections may also be too busy to respond or participate
- Insider/outsider issues- communities who want to work with their 'own'



How do you want to partner?

- Type of engagement/partnership?
 - Are you seeking recruitment sites, advisors, decision-making collaborators?
 - Different partners may be involved to different extents
- Level of formality?
- Level of commitment? Long term relationship or single project?
- If on funded project, what does funder require/allow?



Preparing to reach out to potential partners

- What info about your research team/project do you want to share with possible partners?
 - Your passion for the work, draft aims or submitted proposal & budget, why you want to engage, type of stakeholders & engagement you're seeking, your prior engagement experience
- What info will you want to know about possible partners?
 - Their experience with research/topic/population, capacity to engage, resources they need to support their engagement



Approaching Stakeholders

- Existing relationships? Connections/Referrals?
- Who approaches (PI vs staff)? How? Email, phone, coffee, screening?
- Building trust- sharing, communicating/ discussing/documenting expectations (MOU)



Approaching Stakeholders & Building a Healthy Relationship

- Finding & connecting with the ‘right’ partners
 - Existing relationships? Connections/Referrals?
 - Who approaches (PI vs staff)? How? Email, phone, coffee, screening?
- Figuring out if these are stakeholders you want to work with. ‘Interview’ them
 - ‘Click’ with?
 - Interested in same things- content & working style?
 - Enough bandwidth/capacity?
- Who needs to make decisions or support this?



Set Stage for Healthy Partnership: Moving from partners to partnership



- **Build trust-** get to know each other, socialize, sweat equity, humor
- **Communicate** early, well, & often- which methods work, what language is being used
- **Discussing, Setting, Documenting expectations (MOUs).** Clear understanding of everyone's roles, responsibilities, & deliverables.
- **Allow time & discuss process** for decision making



Sustaining Engagement

Orientation and ongoing

- What do stakeholders need to know to be prepared to participate?
- How is the partnership creating a culture of respect, openness that will lead to more participation and engagement?
- What do stakeholders need to feel up to date ongoing, keep them connected?
- Provide regular reminders: what are we doing, why are we doing it, what have we done, where are we now, where are we headed (today & by project's end)



- **Showing up-** staying connected, being physically present
- **Checking in-** conduct partnership/process evaluation and/or informally asking how things are going for them
- **Addressing challenges/conflicts**
- **Fun, celebrating success-** contributions are recognized
- **Stay connected** during quiet times, between grants, projects
- **Turnover-** prepare for when stakeholder staff leave partner organization or when academic PI or staff leave
- **Short & long term benefit** to stakeholder, research, community- remind people of the bigger vision/goal of why they are. If they feel it's beneficial to them personally and that it is contributing to a broader change/goal, they will stay.

Engagement by researcher/research team vs engagement by academic institution

- Individual vs institutional relationships
- Perception- communities don't differentiate
- Benefit or pay for your colleagues' efforts/errors
- Other types of engagement- student education, broad-based partnership



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**Community-Campus
Partnerships for Health**

Promoting Health Equity and Social Justice

www.ccphealth.org

- Patient & Family Engagement Rubric
- Sample Patient Engagement Plans



<http://www.pcori.org/funding-opportunities/what-we-mean-engagement>



Community-Based Public Health Caucus



Journal

