



Getting started in Stakeholder Engagement:

*Putting the
pieces together*

Spring 2022
4-part workshop series



GR THOMAS ADVISORS LLC

ENGAGING DIVERSE VOICES TO PROMOTE RESEARCH AND POSITIVE HEALTH OUTCOMES

Helpful tips for Virtual Meetings



Find a quiet, private place to sit for the whole meeting.



Log in 5-10 minutes before the start time



Consider using headphones for better sound



Stay muted when you aren't speaking.



Use "raise hand" feature, literally raise your hand or use the chat box to let us know you've got a comment/question.



Allow pauses after speaking so colleagues aren't talking over one another. (There can be small delays with video)



When you talk, please start by saying "This is [your name]..... So we know who is speaking.



Keep your video on during the meeting when possible.

Agenda & Introductions

Agenda

Stakeholder engagement - HOW

- Best Practices to maximize value for all involved
- Apply to May CARDS meeting

Introductions

Share your name and one topic you like to talk about

Recap – learning objectives

- ✓ WHO:
 - Identify stakeholder categories and groups most relevant to research team
- ✓ WHY:
 - Understand how stakeholders can affect research and research outcomes
 - Understand how stakeholder engagement could add value to your program of research
- HOW: Describe key steps in planning stakeholder meetings
- Recognize important elements in a stakeholder engagement plan
- Gain awareness of existing resources to support stakeholder engagement



#1: Know Your Audience

- A. Who are they?
- B. What “language” do they speak?
- C. What do they expect from this meeting?

#2: Prepare your audience

Your stakeholders:

- A. Know their “job” and responsibilities
- B. Have the tools & confidence to get the work done
- C. Are given a clear, consistent agenda (relevant background info)

#3: Make sure you are prepared

You and your team:

A. Clarify the meeting objectives

- WHY are you meeting? WHAT does success look like?
- Action-oriented

B. Pick the “right” topics/materials

- Items within your power to act on
- Appropriate for audience

C. Create and follow a clear, consistent agenda

- Share your personal interest, desired outcomes
- Provide context for the materials or issue

#4: Follow up

You and your team:

- A. Let the stakeholders know how the research team is using their input
- B. Share any relevant data, findings or outcomes

1. Know your audience
2. Prepare your audience
3. Make sure you are prepared
4. Follow up

Community Advisors on Research Design and Strategies (CARDS)[®]



Who are the CARDS®?

Typical Community Advisory Board	CARDS
Mix of academics, community leaders, advocacy/other group members	All community members
Recruited by research team because of position or interest <ul style="list-style-type: none">• “Spheres of influence”• Community group leaders• Advocates/Activists• Prominent citizens	Recruited by Community Center staff, because of Center services use <ul style="list-style-type: none">• Senior meals• Food pantry• Women’s support groups• Parenting programs
Single project or issue focus	No single focus
Training: Varies	All member complete training→ how to use lived experience to offer actionable advice

Applying Best Practices – the CARDS

Sample Agenda 90-minute Stakeholder Meeting <ul style="list-style-type: none"> Location Date Time 			
Item	Lead	Time	Purpose
Welcome/Announcements		2 mins	<ul style="list-style-type: none"> Welcome Good time to turn off cell phone Review meeting tips Other announcements as necessary
“Close the Loop”		3 mins	<ul style="list-style-type: none"> Show impact/value of stakeholder input Demonstrate transparency/honesty in how input is being used
Opening Question/Intros		10-15 mins	<ul style="list-style-type: none"> Get everyone talking/engaged Use a question related to content of meeting, if possible Focus on assets of all participants
Research Overview		5 mins	<ul style="list-style-type: none"> Provide brief introduction to researcher/research topic Offer insight into researcher's personal interest in topic Help stakeholders personally connect with researcher

Group discussion “Set the Stage”		5 mins	<ul style="list-style-type: none"> Help focus stakeholders to give relevant feedback Provide key info, such as: <ul style="list-style-type: none"> <u>Who</u> is the audience? Who will see the material/document (age, etc)? <u>Where</u> will they be when they see it? (<u>at</u> home alone, in an appointment with a health care provider) <u>What</u> does the research team want the target audience to DO as a result? What is your goal for this material? Any other key information?
Review Materials		60-70 mins	<ul style="list-style-type: none"> Go through the materials section by section, reading each section aloud and asking for feedback. Ask questions such as: <ul style="list-style-type: none"> What are your first impressions? Does this make sense? Is it clear, easy to understand? It is engaging/interesting? Is any important information missing? Is anything confusing, off-putting, <u>scary</u> or offensive? How can this material be improved?

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Group discussion

“Set the Stage”

5 mins

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- Provide key info, such as:
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 - Where will they be when they see it? (at home alone, in an appointment with a health care provider)
 - What does the research team want the target audience to DO as a result? What is your goal for this material?
 - Any other key information?

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Preview of Coming Attractions

Session #3 - May

- Tues. May 10th, 6:30 – 8 pm CST meeting with the CARDS
- Review material from Dr. Catherine Brownstein and Dr. Bernadette Zwaans

Session #4 – June

- Tues. June 14th, 4-5:30 pm CST
- Debrief, wrap-up series, elements of an engagement plan, look ahead