

# Planning Stakeholder Engagement

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**Community-Academic Partnerships**

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# Post-funding: Timeline for Stakeholder Engagement

Funding starts

1 month:  
Stakeholders  
on board

2 months:  
Complete 1<sup>st</sup>  
stakeholder  
meeting

# Upstream Planning for Engagement



# Key Planning Questions 1 - 5

1. Who do I want as stakeholders?
2. What will do they on my project?
3. Where and when will I meet with them?
4. How will I recruit stakeholders?
5. How will I develop recruitment materials?

# Key Planning Questions 6 - 10

6. How will I prepare stakeholders?

7. Who will lead engagement on project?

8. How can I facilitate effective meetings?

9. How can I sustain stakeholder involvement?

10. How do I budget for engagement?

# What's coming up?

- Opening question
- Introductions
- Slides, discussion, small group activities
- (Break 9:45 – 9:55)
- Slides, discussion, small group activities
- Online resources
- Session evaluation

# Opening Question

Write on note card:

- a specific question or concern you have related to planning engagement of patients and other stakeholders



# Table Introductions

- your name
- where you're from (organization)
- your question or concern related to planning stakeholder engagement

# Stakeholders in Research



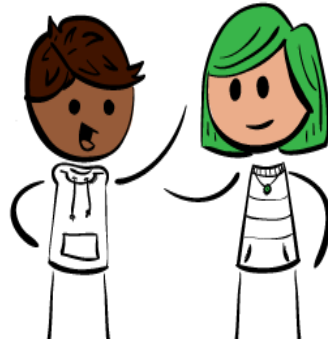
# Engagement Methods

- Interviews
- Focus groups
- Surveys, Delphi process
- Social media
- Existing boards, committees
- Project-specific advisory boards
- One-time multi-stakeholder meeting
- Employ as member of research team

# Activity: Examples of Stakeholder Engagement

In Exemplar and UW Examples:

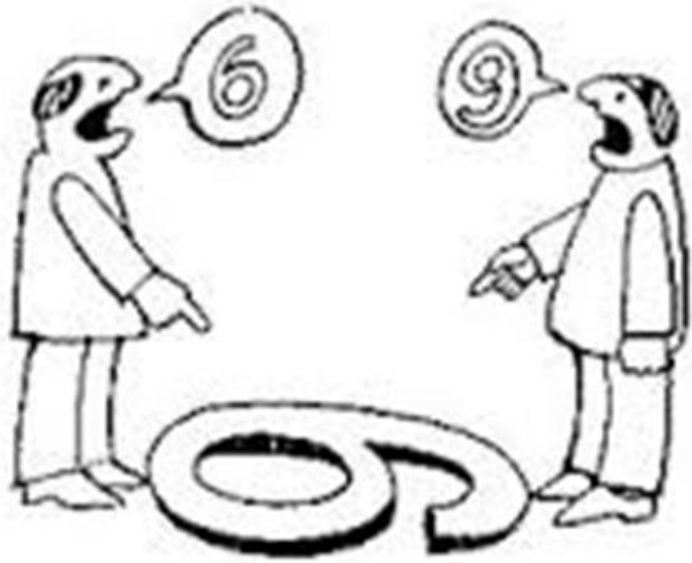
- What stands out to you?
- Does anything surprise you?
- What follow-up questions do you have about these examples?



# Finding Stakeholders: Tailor Strategy to Target



**Is MESSAGE effective  
for audience?**



**Perspective matters**

# What's in it for your stakeholders?

**Job w/responsibilities + benefits**



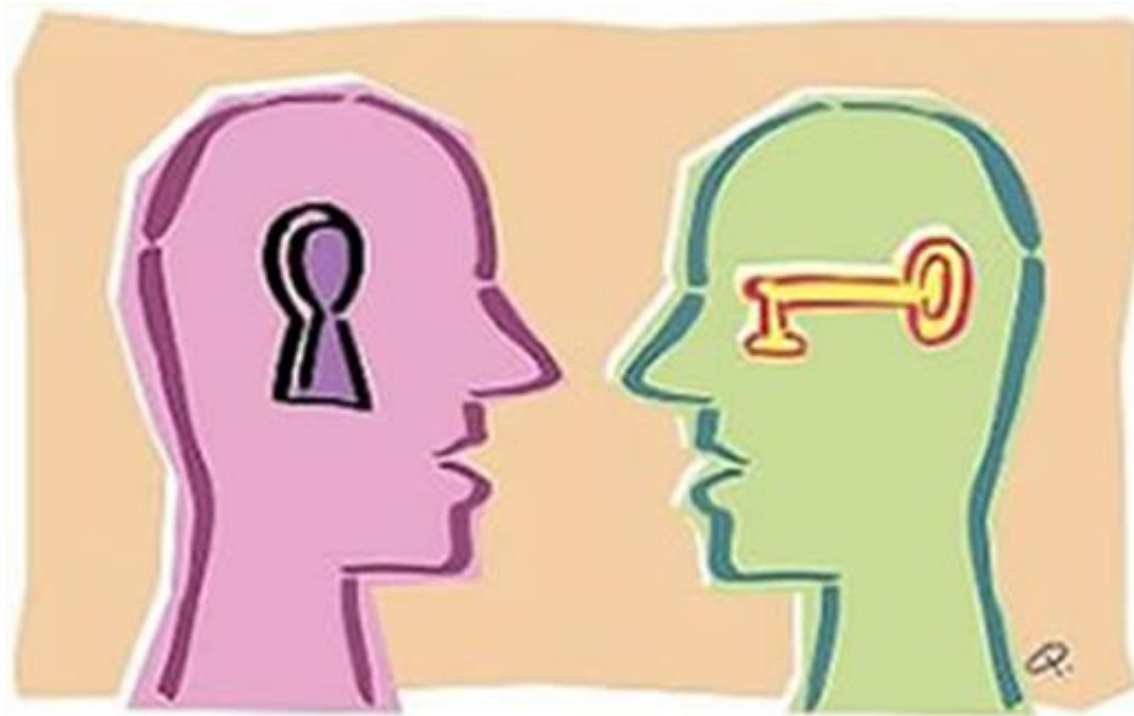
**Chance to contribute**

# Stakeholders want to know. . .

- Project purpose
- Stakeholder responsibilities
- Compensation; other benefits
- Time commitment
- Location
- That they will “help” or “contribute”



Get an **outside** perspective





# Orientation Outcomes



Understand  
responsibilities



Feel  
confident



Feel  
respected



# Activity: Orientation Materials

## Sample Agenda

- Does anything in Content, Objectives surprise you?
- Is there content missing that you expected to see?
- Which content areas are you most curious about?

## Membership Agreement

- Does the document seem useful? Why or why not?
- Are there any sections that seem less important?
- We developed this for patient stakeholders. Would you consider adapting it for other stakeholders?  
Why or why not?

# Budgeting for Engagement

- Do any of these budgeting issues surprise you?
- Is there anything that you would add? Is there anything important missing?
- How would you use the template in grant preparation? When would you use it?

# Stakeholder Compensation

## Stakeholder Payment Mechanisms

Use traditional UW processes—Payment to Individual (PIR) form

Set up a Temporary Custodian fund

Have your community partner pay stakeholders

# Engagement Resources

- ICTR

<https://ictr.wisc.edu/>

- HIPxChange

[www.hipxchange.org/StakeholderEngagementTools](http://www.hipxchange.org/StakeholderEngagementTools)