

Stakeholder Engagement in Complex Environments: One Size Does Not Fit All

Plenary Address by Mónica Pérez Jolles, PhD

The use of pragmatic trials and calls for stakeholder engagement during trial implementation have common goals -- increase diversity of views and contributions, co-creation during the implementation process, and sustainment of evidence-based practices in real-world clinical and community settings. Early calls for the value of pragmatic trials can be traced back to 1967 with Schwartz and Lelouch's call for 'pragmatic attitudes' during clinical trials. The younger field of implementation science with an emphasis on contexts and faster translation of evidence into routine practices in real-world settings can greatly contribute to the achievement of pragmatic trial goals. I will first provide an overview of the concept of implementation strategies and their role in pragmatic trials, as well as an overview of the state of the literature. Then, I will discuss stakeholder engagement using the 7 P's Stakeholder Matrix by highlighting the role of context on shaping engagement within and across stakeholder categories. Last, I will advocate for the inclusion of engagement strategies that can foster co-creation, and social justice and inclusion, as promising avenues to increase health equity in the United States. My overall goal is that this discussion will enable a shift, from linear and formulaic approaches to engagement with diverse communities, to a context-dependent and health equity approach.

ⁱ Schwartz D, Lelouch J. Explanatory and pragmatic attitudes in therapeutic trials. *Journal of Chronic Disease*. 1967; 20:637–48.

Learning Objectives:

1. Learn the concept of implementation strategies and its role in pragmatic trials
2. Identify state of the literature on approaches to stakeholder engagement in pragmatic trials, limitations, and future research
3. Analyze stakeholder engagement taxonomies (7 P'S Stakeholder Matrix) as context dependent
4. Learn various ways to incorporate stakeholder engagement in grant applications and scientific publications
5. Advocate for concrete ways to co-create and incorporate a lens of social justice and inclusion in stakeholder engagement efforts

Thought Questions

1. How can you increase tracking and reporting of engagement activities throughout the study?
2. What is your take on the statement that stakeholder engagement is context dependent? Do you agree or disagree and why?
3. How can stakeholders in your community benefit from engagement in the research process?

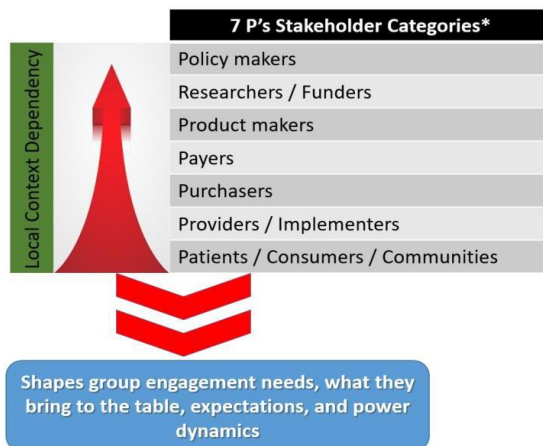


Stakeholder Engagement in Complex Environments: One Size Does Not Fit All

Plenary Address by **Mónica Pérez Jolles, PhD**

Key Points

- Active stakeholder engagement increases the quality of the research, and the success of the implementation, and sustainment of EBPs
 - I will summarize the literature and provide an example (A 2020 systematic review on patient involvement gave our study the highest rating of quality.)
- Several systematic literature reviews highlight the comprehensiveness of stakeholder engagement during pragmatic trials, as well as limitations related to lack of tracking and reporting of engagement activities
- The field of implementation science can address some of these gaps by:
 - Leveraging tested implementation strategies (definition and classification)
 - Conceptualizing stakeholder engagement as context dependent (complexity)



*Adapted from: Concannon TW, Meissner P, Grunbaum JA, et al. A New Taxonomy for Stakeholder Engagement in Patient-Centered Outcomes Research. J Gen Intern Med. 2012;27(8):985-991.

- It is important to showcase pre-implementation engagement in grant proposal and to include community partners as co-authors in peer reviewed publications
- Stakeholder engagement benefits communities by promoting a co-creative process rooted in social justice and inclusion
 - I plan on incorporating short video interview clips (1min or less each), from community and research partners, on their take on this key point, from their perspective and experience
 - Partners will represent: An outpatient community clinic in North Carolina, two Federally Qualified Health Center systems, and a Permanent Supportive Housing Agency in Southern California

Stakeholder Engagement in Complex Environments: One Size Does Not Fit All

Plenary Address by Mónica Pérez Jolles, PhD

Resources

1. Brownson R. C., Colditz, G. A. & Proctor, E. K. (Eds.) (2018). *Dissemination and Implementation Research in Health: Translating Science to Practice* (Second edition). Oxford; New York: Oxford University Press.
 - a. See pages 31-34; Chapter 15 – Implementation Strategies for a deeper review of the concept of implementation strategies, a list of evidence-based strategies (ERIC list) and efforts by Powell and colleagues in classifying stakeholder engagement strategies (12.4% of that ERIC list).
2. Concannon TW, Meissner P, Grunbaum JA, et al. A New Taxonomy for Stakeholder Engagement in Patient-Centered Outcomes Research. *J Gen Intern Med*. 2012;27(8):985-991.
 - a. Provides additional information on the 7 P's stakeholder taxonomy.
4. Gesell, S., Halladay, J., Mettam, L., Sissine, M., Staplefoote-Boynton, B., Duncan, P. (2020). Using REDCap to track stakeholder engagement: A time-saving tool for PCORI- funded studies. *Journal of Clinical and Translational Science*, 4(2), 108-114.
 - a. This recent paper emphasizes the use of technology to better track and report on stakeholder engagement in research studies.
5. Maar, M., Yeates, K., Barron, M. *et al*. I-RREACH: an engagement and assessment tool for improving implementation readiness of researchers, organizations and communities in complex interventions. (2015). *Implementation Science*, 10(64). <https://doi.org/10.1186/s13012-015-0257-6>
6. Bombard, Y., Baker, G.R., Orlando, E. *et al*. Engaging patients to improve quality of care: a systematic review. *Implementation Sci* 13, 98 (2018). <https://doi.org/10.1186/s13012-018-0784-z>
 - a. These two papers provide a review of relevant approaches and contextual factors to maximize patient engagement during intervention development and implementation, and an assessment tool.

[Notes]

