

# Pragmatic Research Planning Workshop

## **Community Engagement**

*Worksheet #7*

### **Selecting Engagement Method(s)**

**Use this worksheet with the following sessions:**

- Community Engagement

#### **Identifying your partners, engagement purposes, resources and assets:**

- What types of people have you or do you plan to engage? Who else might be important to engage? (Consider multiple socio-ecological levels, e.g., community members/patients; setting staff; setting leaders; policymakers)

Use the 7Ps matrix to brainstorm different stakeholder types and specific individuals or organizations you will approach for engagement.

- What are the relevant purposes of engagement? (e.g., research planning, implementation, conduct, dissemination)
- Where are you in the process of developing and implementing your study protocol? Are you open to redirection from your stakeholders at this point?
- What resources (including time) do you have available to support your engagement efforts?
- What assets do you have to support your engagement efforts – such as existing stakeholder, community or patient partners, or technical expertise and experience?

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## **Community Engagement**

*Worksheet #7 continued*

### **Selecting an engagement method:**

- In what phases or stages of your research will you engage partners? For what purposes to engage partners in research planning, conduct, or dissemination?
- Will you convene an advisory board? What will their responsibilities be and for how long? How will you identify and invite them to participate? How will you fund their time?
- What strategies (e.g., group facilitation techniques) will you use to elicit the perspectives of those who participate in engagement activities?
- What will be the role of your partners in decision making? Will consensus be required? How will you establish consensus?
- How will you assess the extent to which your partners agree that your pragmatic study design features reflect real world systems, structures, and processes of care?

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## Community Engagement

### *Worksheet #7 continued*

- Critical questions focused on assessing and addressing power in research engagement.  
Informed by: <https://journals.sagepub.com/doi/full/10.1177/26334895211064250?s=03>

| Planning Phase       |  |
|----------------------|--|
| Inner Context        | Who holds decision-making power/leadership for the initiative?   |
|                      | Are those individuals impacted by the health issue of focus meaningfully involved?   |
|                      | Are these individuals meaningfully compensated for their labor?  |
|                      | What dynamics within your organization may impact the community's ability to access intervention benefits?                 |
|                      | Do communities trust and feel welcomed by your organization and staff?   |
|                      | Is the community supported physically through building accessibility? Emotionally and culturally/linguistically?           |
| Outer Context        | What factors outside the organization will impact intervention selection?  |
|                      | How does the policy environment influence the identified issue? The intervention options?                                  |
|                      | How might the built environment, sociopolitical and cultural environments impact intervention selection? (e.g. Stigma)     |
|                      | What role do funders play in the social construction of the issue at hand?   |
| Implementation Phase |  |
| Inner context        | Do you have a plan to support staff in working with marginalized groups and addressing power?                              |
|                      | Do you have mechanisms to collect and integrate ongoing feedback from community members participating in the intervention? |

### Key Resources and References for Engagement

1. Concannon TW, Meissner P, Grunbaum JA, McElwee N, Guise JM, Santa J, Conway PH, Daudelin D, Morrato EH, Leslie LK. A new taxonomy for stakeholder engagement in patient-centered outcomes re- search. *Journal of general internal medicine*. 2012 Aug 1;27(8):985-91.
2. [https://cdn.ymaws.com/www.iap2.org/resource/resmgr/pillars/Spectrum\\_8.5x11\\_Print.pdf](https://cdn.ymaws.com/www.iap2.org/resource/resmgr/pillars/Spectrum_8.5x11_Print.pdf)
3. <https://www.pcori.org/sites/default/files/Engagement-Rubric.pdf>
4. <https://www.pcori.org/engagement/engagement-resources>
5. The Engage2020 Action Catalogue: <https://engage2020.eu/news/action-catalogue-an-online-method-tool-that-lets-you-find-the-exact-method-you-are-searching-for/>
6. Deliberative Democracy Institute Wiki: [http://www.delib.org/wiki/index.php?title=Main\\_Page](http://www.delib.org/wiki/index.php?title=Main_Page)
7. CSU Center on Public Deliberation: <https://cpd.colostate.edu/what-is-deliberation/>
8. Participedia: <https://participedia.net/en/methods/deliberation>
9. National Coalition for Dialogue and Deliberation: <http://ncdd.org/>
10. Liberating structures: <http://www.liberatingstructures.com/>

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## Community Engagement: The 7 P's Matrix

*Worksheet #7 continued*

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.

| Project Specific               |   |  |  |   |   |
|--------------------------------|---|--|--|---|---|
| Stakeholder Category           | Definition  | Possible Stakeholder Roles   | What specific groups or individuals will you engage? | What needs, contextual factors, and preferences must be considered? | How are these stakeholder types engaged in the project? |
| <b>Patients and the public</b> | Current and potential consumers of patient-centered health care and population-focused public health, their caregivers, families, and patients and consumer advocacy organizations  | Decision to become involved in the program?<br>Identify decisions, questions, benchmarks for success. Input agent for QI/evaluation, interpret findings, offer solutions |  |   |   |
| <b>Providers</b>               | Individuals (e.g., nurses, physicians, mental health counselors, pharmacists, and other providers of care and support services) and organizations (e.g., hospitals, clinics, community health centers, community-based organizations, pharmacies, EMS agencies, skilled nursing facilities, schools) that provide care to patients and populations. |  |  |   |   |
| <b>Purchasers</b>              | Employers, the self-insured, government and other entities responsible for underwriting the costs of healthcare   |  |  |   |   |
|                                |   |  |  |   |   |

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|--------------------------------|--|--|--|--|--|
| <b>Payers</b>                  | Insurers, Medicare and Medicaid, state insurance exchanges, individuals with deductibles, and others responsible for reimbursement for interventions and episodes of care  | Decision about paying for program, how to select patients for inclusion in the program, whether to incorporate program into SOP as part of the health plan, how consistent with existing structures and services vs duplicative/overlapping. |  |  |  |
| <b>Policy makers</b>           | The White House, Department of Health and Human Services, Congress, states, professional associations, Intermediaries, and other policy-making entities; public policy makers and policy advocates working in the non-governmental sector. |  |  |  |  |
| <b>Product makers</b>          | Drug and device manufacturers; industry partners   |  |  |  |  |
| <b>Principal investigators</b> | Other researchers and their funders  | Funders and Investigators can begin immediately to identify appropriate intermediate and long-term benchmarks for evaluating the effectiveness of engagement. keeping In mind that the optimal organization                                  |  |  |  |