

Engagement – Detailed Guidance

Specifying a knowledge gap, defining your end-users, narrowing it to a focused and feasible question, explain exactly what you're measuring, and using prior experience to develop a plan that allows systematic investigation.

Review the guidance by the elements below. Being clear on these details will limit future setbacks.

We recommend using a tool to help guide your engagement and have created a worksheet to help teams gather and reconcile the information quickly and clearly.

Effective partner engagement means intentionally involving stakeholders (e.g., patients, community groups, policymakers) in ways that match their roles and the project's needs, from early planning through implementation, to improve relevance and impact. Clear expectations, structured processes, ongoing communication, and active incorporation of feedback help build trust, strengthen collaboration, and ensure contributions meaningfully shape decisions. When done well, engagement leads to more credible, inclusive, and actionable outcomes that are more likely to be adopted and sustained in real-world settings.

1. What is Partner Engagement?

Partners can include patients, policy makers, community organizations, or other people/organizations with an invested interest in a project.

Why It Matters

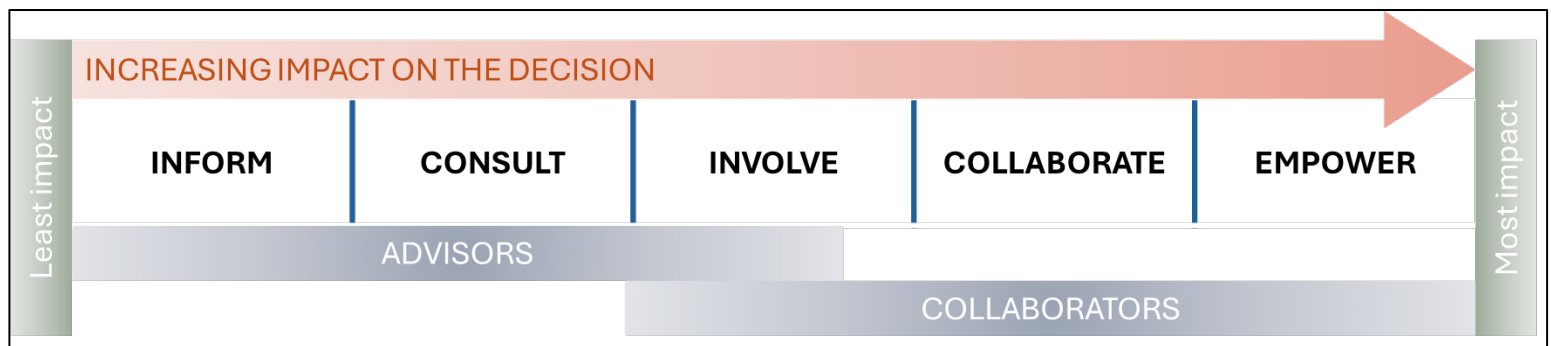
Partner engagement ensures that research and projects are relevant, feasible, and acceptable to those most affected. By involving diverse partners, you enhance the quality, credibility, and impact of your work.

Types of Partners

By “partners” we mean individuals or organizations with an ongoing relationship with the research team. Their role may vary from advisor to collaborator. For example, a local health department may work with researchers across multiple projects, shaping goals and sharing results with the community.

Type	Definition	Example
Advisors	Provide guidance, feedback, or expert input to inform the research process, often through advisory boards or consultations.	A patient advisory board reviews recruitment materials to ensure they are culturally appropriate.
Collaborators	Actively participate in the research process and co-design the study. They share responsibility and decision-making in the project.	A community organization co-develops the study protocol and helps analyze and interpret findings.

Spectrum of participation – Talk about power sharing and how it increases as you move to the empower. There are reasons to use each of the different levels in participation, it's not always needed for every partner to be a collaborator. Think about why you are engaging each partner individually and decided their level of engagement based on that.



Actions Steps

- **Identify and invite** relevant partners early in the project.
- **Clarify roles and expectations** for engagement.
- **Use both group-based and individual settings** to gather input.
- **Involve partners across key phases:** recruitment, question development, study design, implementation, and dissemination.
- **Follow an engagement continuum** (see figure above) to tailor involvement levels.

Example

In a community health study, researchers collaborated with local organizations and patient advocates to co-develop survey questions. This led to higher participation rates and more actionable insights because the questions reflected community concerns.

Impact Summary

Improved relevance and cultural sensitivity of research

Increased trust and buy-in from communities

Enhanced recruitment and retention

More effective implementation and dissemination strategies

Greater likelihood of real-world application and sustainability

Tools and Resources

- **PCORI Value of Engagement Rubric** – Framework for meaningful partner involvement.
 - **Community Advisory Boards (CABs)** – Structured group input.
 - **Stakeholder Mapping Tools** – Identify and prioritize partners.
 - **Facilitation Guides** – Support inclusive and productive engagement sessions.
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2. Why is Engagement Important?

Why It Matters

Engaging partners in research and program development enhances the **quality, relevance, and impact** of the work. When those most affected by the outcomes help shape the project, it becomes more aligned with real-world needs and values, increasing its effectiveness and adoption.

Actions Steps

- Involve partners in setting goals and priorities.
- Co-design interventions with input from end-users.
- Engage partners throughout planning, implementation, and dissemination.
- Create feedback loops to ensure ongoing collaboration.
- Build structures for transparency and shared decision-making.

Example

A public health initiative invited community leaders and patient advocates to co-design an intervention targeting chronic disease management. Their input led to culturally tailored strategies and improved community participation, ultimately boosting health outcomes.

Impact Summary

Greater alignment with community needs and values

Increased adoption and sustainability of outcomes

Strengthened trust between researchers and communities

Enhanced transparency, accountability, and mutual respect

More equitable and inclusive research practices

Tools and Resources

- [Systematic review of community engagement approach in research: describing partnership approaches, challenges and benefits | Journal of Public Health](#)
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3. When Should I Engage Partners?

Guiding Principles

A few guiding principles can help you decide *when* and *how* to involve partners meaningfully

- **There's no one-size-fits-all approach to partner engagement.** The timing and methods should reflect the specific goals, resources, and context of your project or study.
- **Early involvement is ideal.** Bringing partners in at the very beginning (e.g., planning or design phase) helps ensure that the project addresses meaningful problems; Partners are included before and while decisions are made, not after, and that the team is not overlooking critical perspectives.
- **Engagement should be ongoing.** Consider assessing and revisiting engagement at multiple points in the project: at the start, in the middle, and at the end. You do not need to always create a new group. You can tap into existing groups!
- **Flexibility matters.** Partners can be engaged during different and multiple phases: intervention or program design, planning, implementation, or dissemination; depending on capacity and project needs. Even if resources are limited, involving partners in at least one key phase can significantly improve the relevance and usability of your work and the team can learn from partners (mutually beneficial).
- **Dedicate resources and an allocated budget to support your partners' engagement**
 - [The Implementation Costing Guidebook](#) provides information for non-economists to include aspects of costing into projects and proposals.
 - [Dedicated Funds for Engagement & Partner Compensation | PCORI](#) – This resource describes how to dedicate funds specifically for partner engagement in meaningful ways.

Tools and Resources

- [Tips for Early Engagement](#) – Practical starter guide.

4. Key Steps to Engaging Partners

Why It Matters

Intentional partner engagement strengthens the relevance, quality, and impact of research and programs. Thoughtful planning around *who* to engage, *how*, and *when* ensures that the process is inclusive, efficient, and aligned with the goals of your project. Clear roles and expectations help build trust and foster meaningful collaboration.

Actions Steps

1. Identify Needed Expertise

Determine which types of partners (e.g., patients, healthcare professionals, policy makers) are most relevant. Use tools like the [7Ps Table](#) (Spell out and make clear why 7 Ps relevant) to guide selection.

2. Define Engagement Roles

Use the engagement continuum (Figure 1) to clarify the type and level of input needed. Be transparent with partners about their roles. (Table 1)

3. Access Networks

Identify contacts or networks (e.g., friends, colleagues, organization allies) to reach expert partners.

Prepare a visual summary (minimal text) to introduce your project before engaging network members.

- Framing the ask. You may feel unsure how to ask different group leaders to be engagement partners. You may feel they're too busy or not interested. Most people want to help. Here are some pro tips on how to frame your ask:
 - ✓ Sell your idea a bit – why it's important. Short, focus on significance.
 - ✓ Be clear about the ask: "I need to recruit xx patients over this time to answer my question, and I hope this will not take much of your time at all..."
 - ✓ Ask them for authentic feedback on your idea if they're interested. It's more fun when you're engaged in research rather than "used" for participants.
 - ✓ Ask if they know of anyone else who might be interested in helping. Even if people are busy, they often know someone whose interest and time might fit yours.
 - ✓ Thank them for their time.

4. Plan Meeting Frequency

Align meeting schedules with your budget and timeline.

- Collaborators may require more frequent, compensated sessions.
- Advisors may engage less frequently, such as through advisory boards.
- Work toward a balance between enough involvement to get key input and create ownership but not become burdensome or inordinately expensive.

5. Establish Group Processes

Decide how decisions will be made and how suggestions will be prioritized during meetings.

6. Monitor Engagement Quality

Check in with partners informally or through surveys at key points (early, mid-way, end) to assess how well the group is working together.

7. Track and Respond to Feedback

Document partner recommendations and your response:

- Applied fully, partially, or not at all.
- If not applied, explain why and share that rationale with partners.

Example

A research team developing a mental health intervention identified the need for input from both patients and clinicians. They used the engagement continuum to define roles – patients served as collaborators in co-design sessions, while clinicians acted as advisors. The team created a visual summary of the project and shared it with a professional network to recruit partners. Regular meetings and feedback loops helped refine the intervention and build strong relationships.

Impact Summary

Clearer expectations and stronger collaboration.

More relevant and community-aligned outcomes.

Increased trust and transparency.

Better decision-making and project adaptability.

Stronger foundation for long-term partnerships.

Tools and Resources

- **7Ps Table** – 7 types of partners and possible roles they have
- **Research Engagement Survey Tool** – Tool to assess partner engagement.
- **Observation Checklist Template** – Tool to track observations during engagement

5. Building relationships with your partners

Why It Matters



R2P2

Rapid and Rigorous Patient Centered Program

R2P2 combines strategies for fast results with strict patient-focused research standards.

Building strong relationships with partners and fostering meaningful engagement is essential for trust, collaboration, and long-term success. Clear, consistent communication helps partners feel valued and informed, which increases their willingness to contribute and stay engaged throughout the project.

Actions Steps

- **Minimize jargon** and tailor communication to your partners' backgrounds and preferences.
- **Check in regularly** to share updates and gather feedback on the engagement process.
- **Use multiple communication channels** (email, text, calls, virtual meetings) to meet partners where they are.
- **In meetings, encourage partners to raise hands to add feedback**, either physically or virtually.
- **Monitor and respond to chat input** during virtual meetings and include it in meeting notes.
- **Offer alternative engagement formats**, such as one-on-one meetings or asynchronous reviews.
- **Understand partners' goals and needs** to align engagement with their motivations.
- **Create informal connection opportunities** like sharing food, unstructured networking time, or light team-building activities.

Example

In a community-based research project, the team sent monthly newsletters, held informal coffee chats, and used both email and text to communicate with partners. These efforts created a welcoming environment and helped partners stay informed and involved, leading to more authentic input and stronger outcomes.

Impact Summary

Stronger relationships and trust between project teams and partners.

Increased partner satisfaction and sustained engagement.

More inclusive and responsive project design and implementation.

Enhanced credibility and collaboration across diverse stakeholder groups.

Greater likelihood of achieving outcomes that reflect community priorities.

How to Reach Consensus

Reaching consensus in research requires structured processes that maximize representation of diverse viewpoints and are conducive towards transparent decision making. You may not reach complete consensus, but as close to it as possible will benefit your results of engagement. Two approaches are **Nominal Group Technique (N)** and **prioritization exercises**. Below are guides and fillable pdfs for both

Tools and Resources

- Nominal Group Technique – Guide and fillable PDF to help reach consensus.
 - Prioritization Exercises – Guide and fillable PDF to help reach consensus.
 - [Research Engagement Survey Tool](#) – Tool to assess partner engagement.
 - [Moderating Research Engagement Sessions](#) – Strategies for facilitation
 - **Consider strategies to foster a meaningful experience for partners:** Check out this resource from PCORI to achieve this goal: [Meaningful Inclusion of Partners in Decision Making | PCORI](#)
 - **How to handle disagreements or conflicting advice/recommendations from partners:** [\[link\]](#)
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6. Incorporate feedback from partners

Use Polls to Gather Input

- Create short, focused polls to capture partners' opinions or preferences on key decisions.
- Keep questions simple and clear to encourage quick participation.
- Use multiple response formats (e.g., multiple choice, rating scales) to make input easy and comparable.
- Consider anonymous polls to promote candid feedback.

Facilitate Prioritization Exercises

- Invite partners to rank or categorize options based on importance, feasibility, or urgency.
 - *Example: Failure Mode & Effects Analysis Assessment* [\[insert link\]](#)
- Encourage partners to explain their rankings to provide context.
- Look for patterns to identify areas of consensus or divergence.
- Other Engagement Processes
 - Brain writing
 - Pre-mortem activity
 - We suggest reviewing [DICE Methods](#) for lots of different and innovative ideas

Discuss Results Together

- Share poll results and prioritize outcomes in a transparent, visual format.
- Facilitate group reflection on the results, encouraging partners to add context.
- Highlight areas of agreement and disagreement and collaborate on next steps.
- Document key decisions and follow-up actions to show that input was acknowledged and used.

Close the Feedback Loop



R2P2

Rapid and Rigorous Patient Centered Program

R2P2 combines strategies for fast results with strict patient-focused research standards.

- After decisions are made, communicate how partner feedback influences the outcome.
- Clearly explain which suggestions were adopted, which weren't, and why. This transparency builds trust and encourages continued engagement.

Add a Dedicated Observer

- Capturing all feedback during discussions can be challenging—especially in dynamic settings.
- Assign a note-taker or observer whose sole role is to listen and document input.
- If appropriate and with consent, record sessions to revisit and verify contributions.
- Use an observation checklist to capture non-verbal cues (e.g., nodding, hesitation, agreement), which can reveal support or concerns not expressed verbally.
 - *[Insert link to observation checklist]*

Tools and Resources

- **Failure Mode and Effects Analysis** – tool to help you rank priorities based on severity, occurrence, and detection
- **Methods for decision-making- one-2 lines to explain what these are- how detailed, etc.**
- **Tool to track partner recommendations over time**