



## Tip sheet: Engagement

### **What is partner engagement?**

Engagement is working with partners in the phases of design, implementation, and sharing of results for your study/project. Engagement should occur throughout the project.

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

### **Why is this step important?**

- Engaging partners informs the questions, goals, and products produced (e.g., decision aid, exercise program, etc.) and makes your intervention more likely to be used and sustained.

### **What are the key goals of this step? (Timing)**

- Ideally, convene partners early in the project/study (e.g., focus groups, key informant interviews)
- Engage partners throughout, especially at the beginning, middle, and end of a project
- Be sure to assess the success of engagement throughout – this can be a simple check in or more formal comprehensive assessment (should align with project goals)

#### **Key Steps**

1. Identify the type and level of expertise needed from partners.
2. Decide on meeting frequency based on the budget and timeline of the project.
3. Decide how to collaborate, make decisions, and prioritize feedback.
4. Pay partners for their time.
5. Track feedback and resulting actions.

#### **Pro Tips**

- *Groups evolve - if your group no longer works at some point, make changes!*
- *Make sure partners have the resources needed to actively participate*
- *Foster an environment in which people feel safe making critical comments*
- *Groups like seeing what changes you've made based on their feedback*

#### **Common Pit Falls**

1. Bringing partners in too late, limiting their ownership and ability to shape the project.
2. Failing to communicate clearly, including not sharing updates or closing the loop.
3. Not addressing logistical barriers like access, scheduling, or language needs.
4. Failing to define roles, causing confusion about expectations and decision-making.

#### **Actions to Avoid Them**

1. Bring partners in early, before key decisions are made.
2. Establish clear, consistent communication with regular updates and follow-ups.
3. Identify and address logistical needs upfront (access, timing, language).
4. Clearly define roles and expectations at the start.