**Stakeholder Engagement Strategies**

**Communication:**

* Phone calls
  + To whom, frequency
* Meetings (virtual or in person)
  + With whom, frequency, do they want presentations? Formal or informal?
* Postcard
* Newsletters
  + Content, frequency
* Factsheets, tip sheets
* Reference guides
* “Think Aloud” technique
  + say out loud what you are **thinking** about when considering stakeholders to contact
* Build relationships – be on a first name basis and know some facts about them both professionally and personally
* When emailing or calling stakeholders ask a few questions about how XXX is going
* Verbal: Straightforward language, avoid idioms and assumptions
* Non-Verbal: Open body language, non-threatening, engaged, eye contact
* Written: Standardized, well organized, easy to follow (low cognitive load)
* Visual: Clarity, consistency

**Communication Strategies:**

* Provide information in a way that’s clear and in the way they want to receive it.
* Always ask if they have any questions.
* Utilize Teach Back Methodology to ensure clarity
* Think about the communication engagement strategies
* Effective communication is closed loop
* Be clear about what you’re asking for, what you expect of them, and what they should expect and receive from you
* Track meetings and emails – all communication with them – so you can refer back to it in the future if necessary

**How to identify stakeholders:**

*Brainstorm*. Get together with people in your organization, officials, and others already involved in or informed about the effort and start calling out categories and names.  Part of the point of brainstorming is to come out with anything that comes to mind.  After 10 or 15 minutes, stop and discuss each suggestion, perhaps identifying each as a primary, secondary, and/or key stakeholder.

*Collect categories and names from informants in the community* (if they’re not available to be part of a brainstorming session), particularly members of a population or residents of a geographic area of concern.

*Consult with organizations* that either are or have been involved in similar efforts, or that work with the population or in the area of concern.

*Get more ideas from stakeholders* as you identify them.

If appropriate, *advertise*.  You can use some combination of the media, community meetings, newsletters, social media, targeted emails, announcements by leaders at meeting, and word of mouth to get the word out.  You may find people who consider themselves stakeholders whom you haven’t thought about.

**Things to keep in mind:**

1. Accessibility, timing, language issues, space, compensation, be attuned to power dynamics, numbers of people in room at same time, not having too many professionals in the room, who leads the meeting

2. Allocate enough time and admin support to learn from and to teach each other (come to table with different backgrounds and knowledge).

3. Practice patience and humility with each other- repetition will be needed (longitudinal involvement is necessary to work through any issues). Build trust and learn each other’s modes of communication, longitudinal involvement is needed.

4. Provide whatever information, training, mentoring, and/or other support they need to stay involved. Find tasks or jobs for them to do that catch their interest and use their talents.

5. Engage them in decision-making process through focus groups, community advisory boards, regular site check-ins, usability testing (evaluate a product by testing it on users).

6. Stakeholders can give feedback during your research plan development through informing research questions, help you develop your intervention by identifying gaps or informing you on current care processes, and inform meaningful measures and help you understand what designs might be feasibly implemented in their setting. They can inform data collection approaches, data interpretation, and dissemination of findings as well.

7. Stakeholder engagement is iterative – they may change over time and need consistent engagement. Be persistent with engagement.

**Key Questions:**

* What are your values?
* What would be helpful to you?
* What are your thoughts on the care coordination process?
* What’s your communication plan?
* What are some engagement activities?
* How do you see us working together?
* What is the best way to reach you?
* How often should we be in contact with you?
* What is the best way to provide education on CC&CIM to you?