

STAKEHOLDER ENGAGEMENT (SE) STUDIO FIDELITY CHECKLIST

(adapted from Meharry-Vanderbilt Community Engaged Research Core)

PRE-PLANNING	
1. Application filed: Brief description of project, population of interest, nature of project challenge	
2. Confirm SE Studio is correct approach for researcher's focus	
3. Identify facilitator based on relevant stakeholder characteristics/demographics	
4. Schedule planning meeting and share SE Studio FAQ	
PLANNING MEETING WITH RESEARCHER/RESEARCHER TEAM	
1. PI, navigator, and facilitator meet together	
2. SE Studio process is explained/clarified	
3. SE Studio ground rules for research team are explained	
4. Questions to be posed to stakeholder participants are drafted (2 to 3 max; open-ended)	
5. Characteristics of the stakeholder expert panel are defined	
6. Stakeholder experts are coached on effective communication	
7. Study presentation template with guidelines for completion (provided to researcher)	
8. Identify three (4) possible dates for SE Studio (Breakfast, Lunch, Afternoon, Dinner)	
STAKEHOLDER STUDIO TEAM	
1. Identify neutral facilitator	
2. Confirm stakeholder/community navigator's availability	
3. Identify support staff to help with recruitment, logistics	
4. Develop facilitators guide (3 main questions and probes)	
5. Vet researcher's presentation	
6. Researcher and facilitator review final researcher's presentation and facilitator's guide	
7. Recruit and screen stakeholder participants for expert panel	
8. Review compensation expectations (length of time to receive compensation, type of gift card, etc.)	
COMMUNITY EXPERTS	
1. Ensure no relationship with researcher/research team	
2. Affirm experts representation/membership to stakeholder group of interest	
3. Provide orientation to SE Studio and explain compensation	
4. Provide study materials to stakeholder experts for review, in advance if necessary	
5. Experts complete application (for future SE Studio opportunities)	
LOGISTICS	
1. Poll experts for optimal data and location of SE Studio	
2. Secure meeting room at location with convenient parking and/or transit options	
3. Ensure access to computer, projector and power cords	
4. Ensure digital access to presentation (thumb drive, internet)	
5. Order food order, considering dietary restrictions or needs (for experts and research team)	
6. Print forms: Sign-in sheet, paperwork for expert payment, evaluation surveys, expert comment form	
7. If needed, print research materials for review (flyers, brochures, surveys)	
8. Gather supplies (markers, pens, flip charts, name tags)	
9. Gift cards for payment, if used	
10. Confirm time and location with researcher and experts, including directions, parking, contact info	

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STAKEHOLDER STUDIO EVENT	
1. SE Studio team present	
2. No more than two members of research team in attendance	
3. Approx. 8 to 10 expert panel members in attendance	
4. Welcome and instructions	
5. Overview of ground rules: First names, everyone sit at table, no wrong answers, different opinions are encouraged, everyone on panel participants, do not talk over others; Housekeeping: location of restrooms, turn of cell phones and devices	
6. 10 minute presentation by PI, followed by very brief Q & A for clarification	
7. Facilitator uses facilitation guide to direct conversation	
8. Facilitation techniques used to balance power, include all voices, empower experts, validate experts' comments, stay on focus	
9. Navigator takes notes on flip charts, visible to all	
10. Facilitator reviews expert responses, recommendations for affirmation, validation	
11. Experts complete written comments form	
12. Evaluations completed by researcher and experts	
13. Compensation/gift cards expended, signed for	
FOLLOW UP	
1. Send 'Thank you' to stakeholder experts	
2. Make sure payment is sent to experts in timely manner, if gift cards are not used	
3. Type up summary of SE Studio discourse for researcher (includes expert comments plus specific recommendations)	
4. Contact researcher if additional information or assistance with recommendations is needed	
5. Report back to experts on actions/changes made as a result of their input (may take 3 to 6 months or more, depending on project)	
FACILITATION	
1. Use opener to engage each expert at the beginning, by going around the room and asking: "What are your initial thoughts about the project?"	
2. Call each person by their name to establish rapport as opposed to general use of 'you'	
3. Don't ask close-ended (yes/no) questions	
4. Ask experts to elaborate on short answers; avoid interjecting personal experiences and opinions	
5. Use body positioning to redirect conversation or address dominate experts	
6. Limit researcher/staff commentary	
7. Refocus experts as needed by restating/rewording question	
8. Create 'parking lot' for issues that are not specific to discussion	
9. Give time reminders to move discussion along, as needed	
10. Be comfortable with silences to give experts time to think and respond	
RECORDKEEPING	
1. Enter new experts in stakeholder data base	
2. Process evaluation surveys	
3. Update SE Studio record data database	