### Sustaining Engagement of Blended Stakeholder Boards Across the PCOR Trajectory

| **Dates & Times** | January 19, 2016 and March 8, 2016  
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|  | • 4-6 pm speakers and small group work  
|  | • 6-7 pm optional individual PCOR consultation and mentoring  
| **Location** | 1309 HSLC  
| **Format** | Two interactive workshops (2 hours each) will feature speakers and small group work, followed by individual consultation and mentoring. Light meal provided.  
|  | The focus is on helping attendees develop their own successful stakeholder engagement plans. Optional pre-workshop assignments via Moodle with feedback are available. The interactive sessions are structured as follows:  
|  | • Expert PCOR speakers  
|  | • Small group work – Attendees apply the workshop’s tools and approaches to their own projects  
|  | • Panel of experts addresses questions arising from small group work  
|  | • Individual consultation as desired by attendees during final hour  
|  | Workshop 1 helps attendees develop a list of the types of stakeholders needed and a few potential names of representatives for their boards, as well as a plan for the frequency of meetings so they can then ask stakeholders to participate and begin getting stakeholder commitment or letters of support.  
|  | Workshop 2 helps attendees develop sample stakeholder board agendas/structure for their projects. The focus is on how to partner with stakeholders to optimize the study’s success.  
| **Description** | In these workshops developed for researchers by researchers, attendees will draft a compelling plan for meaningfully engaging blended stakeholder boards across the lifecycle of a research or quality improvement project. Blended stakeholder boards include the diverse perspectives of patients and other populations (which can include hard to reach populations like minorities and children), caregivers, healthcare leaders, providers, and disease advocates.  
| **Instructors** | Elizabeth Cox, MD, PhD; [https://hip.wisc.edu/?q=cox](https://hip.wisc.edu/?q=cox)  
|  | Betty Chewning, PhD; [https://apps.pharmacy.wisc.edu/sopdir/betty_chewning/](https://apps.pharmacy.wisc.edu/sopdir/betty_chewning/)  
| **Program Affiliations** | • Program of Research on Outcomes for Kids (PROKids): [https://www.pediatrics.wisc.edu/research/research-groups/cox/](https://www.pediatrics.wisc.edu/research/research-groups/cox/)  
|  | • Sonderegger Research Center (SRC): [http://pharmacy.wisc.edu/src](http://pharmacy.wisc.edu/src)  
| **Contact Person** | Thuy Dan Tran  
|  | Email: tran4@pediatrics.wisc.edu
### What will the end-user be prepared to do after completing this activity?

End-users will be able to construct detailed plans to meaningfully engage blended stakeholder boards across the lifecycle of a research or quality improvement project. Blended stakeholder boards include the diverse perspectives of patients and other populations, caregivers, healthcare leaders, providers, and disease advocates.

### What’s unique about this activity?

- Creation of a compelling stakeholder engagement plan that encompasses all phases of the project’s trajectory and is unique to each attendee’s project.
- Focus on each individual attendee's success by using an Active Discovery learning approach with small group work and optional pre-session online Moodle-based templates for attendees to receive feedback on their own plans.
- Integrating speakers, including experts from PCORI and the UW Health Sciences IRB, with small group work and personalized feedback.
- Application of an internationally recognized model, the PiiAF Framework, to stakeholder engagement planning and evaluation.
- Use of a blended stakeholder advisory board format to efficiently inform the research.
- Demonstration of the impact and efficiency of an iterative process in which project teams define meaningful questions for stakeholders, gather stakeholder input, implement stakeholder advice or decisions, and report back to stakeholder groups.

### Curriculum/Learning Objectives

| Workshop 1: Who are my stakeholders and why? | Leadership from the PCORI Stakeholder Engagement core will share their institute’s stakeholder engagement priorities and expectations and also take attendee questions. |
| Workshop 1: Creating a rationale for your stakeholder engagement in relation to study aims | In relation to the attendee’s project aims, increase skills to plan and evaluate the impact of stakeholder engagement using the PiiAF model and examples from Project ACE, a highly successful PCORI-funded research effort at UW. |
| Workshop 1: Achieving stakeholder engagement across PCOR trajectory | Enhance attendees’ ability to draft a plan to meaningfully engage stakeholders across the preparatory, execution, and translational stages of research or QI projects. |
| Workshop 1: Setting the stage for ongoing meaningful engagement | Enhance attendees’ skills to use interactive processes for setting stakeholder board norms, processes, and expectations with a diverse audience including hard to reach groups such as children and minorities. |
| Workshop 2: Do my stakeholders need IRB training? | Increase attendees’ knowledge about whether and how stakeholder engagement requires IRB approval. |
| Workshop 2: Developing agendas for stakeholder engagement across the research trajectory | Using Project ACE examples, enhance skills to align meaningful stakeholder board agendas/tasks with research needs in each PCOR phase and incorporate stakeholder input in an iterative, feedback driven process. |
| **Workshop 2: Structure successful meetings** | Enhance attendees’ ability to address basic meeting/board logistics to meet stakeholders’ practical needs while structuring interactive meetings which efficiently produce needed products for the research team. |
| **Workshop 2: Selecting optimal engagement approaches to support your success** | Reinforce attendees’ need to consider values, budget, timeline, and stakeholder engagement resources on this campus for both short term and long term stakeholder engagement. |