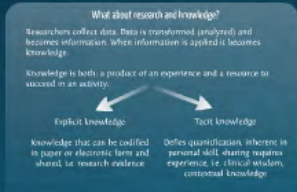


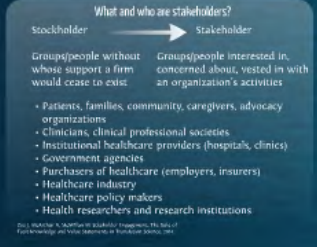
# Questions? Thoughts? Ideas?

- Who are we?
- What are we talking about? Definitions and meaning.
- Open responsiveness?
- What would you do?
- Guiding? Work, case examples
- Take-away message and message.



Clinical/medical sciences and social science traditions of engagement coming together for sustainable partnerships and mutual research benefit.

Engagement treats research as a social process and respects tacit knowledge.



- ### What would you do?
- Who are the key stakeholders?
  - Why is it important to have different stakeholders engaged in different stages (exploration of the problem, conception of an intervention, conception of an evaluation strategy, evaluation of an intervention, scaling of an effective intervention) of the program?
  - How can stakeholders' different perspectives and tacit knowledge be integrated?



There is also increasing effort on stakeholder agendas & agendas by methodological rigor.

**Multi-method and mixed-methods**

The complementary use of quantitative and qualitative methods to provide a rich, multi-faceted view of a phenomenon and the complex social processes of research and implementation.

**Methods**

Qualitative and Quantitative

Qualitative methods are used to explore and understand the meaning of human experiences and social processes. Quantitative methods are used to measure and test hypotheses about human experiences and social processes.

**Process**

Qualitative and Quantitative

Qualitative methods are used to explore and understand the meaning of human experiences and social processes. Quantitative methods are used to measure and test hypotheses about human experiences and social processes.

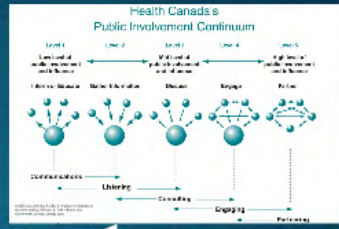
**Qualitative: Open-ended and Semi-structured**

Method	Strengths	Weaknesses
Interview	Rich data, flexibility	Time-consuming, subjectivity
Focus group	Group dynamics, shared experiences	Groupthink, dominance
Observation	Contextual understanding	Observer bias, time-intensive

**Qualitative: Content analysis and Text analysis**

Method	Strengths	Weaknesses
Content analysis	Systematic, replicable	Predefined categories, reductionist
Text analysis	Large-scale, automated	Algorithmic, lacks nuance

## Engagement - What are we talking about? Levels and forms of engagement



U.S.: National Institute of Health

Category	Level	Form	Form	Form	Form
Information	Low	Public hearing	Public meeting	Public consultation	Public survey
Participation	Medium	Advisory committee	Public advisory board	Public advisory panel	Public advisory group
Collaboration	High	Public-private partnership	Public-private partnership	Public-private partnership	Public-private partnership



# Stakeholder engagement

PBRN Workshop  
Thea Luig, PhD, Milton Eder, PhD, Denise Campbell-Scherer, MD, PhD

# Questions? Thoughts? Ideas?

Who are we?  
What are we talking about? Definitions and research.  
Questions and methods?  
What needs to be done?  
Gathering ideas: Case examples  
Literature review and materials

### What about research and knowledge?

Researchers collect data. Data is transformed (analyzed) and becomes information. When information is applied it becomes knowledge.

Knowledge is both a product of an experience and a resource to succeed in an activity.

**Explicit knowledge**  
Knowledge that can be codified in paper or electronic form and shared, i.e. research evidence

**Tacit knowledge**  
Differs qualitatively, inherent in personal skills, sharing requires experience, i.e. clinical wisdom, contextual knowledge

Clinical/medical sciences and social science traditions of engagement coming together for sustainable partnerships and mutual research benefits.

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### What and who are stakeholders?

Stockholder → Stakeholder

Groups/people without whose support a firm would cease to exist

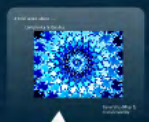
Groups/people interested in, concerned about, vested in with an organization's activities

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- Purchasers of healthcare (employers, insurers)
- Healthcare industry
- Healthcare policy makers
- Health researchers and research institutions

The J. Klineberg & Malcolm M. Stakeholder Engagement: The Role of Tacit Knowledge and Collaborative Innovation in Transformation Science 2013

### What would you do?

- 1) Who are the key stakeholders?
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- 3) How can stakeholders' different perspectives and tacit knowledge be integrated?



Thoughts about integrating different stakeholder agendas & integrating methodological rigour

Multi-method and mixed-methods

The complementary use of qualitative and quantitative methods (mixed methods) provides both tacit and explicit knowledge and the complex, social processes of research and implementation

### Stakeholder Engagement

Stakeholder engagement is the process of identifying, understanding, and addressing the interests, needs, and expectations of all those affected by, or who can affect, an organization's ability to create value.

### Stakeholder

Stakeholder is any individual or organization that can affect or be affected by the achievement of the organization's objectives.

### Stakeholder Perspectives and Methods

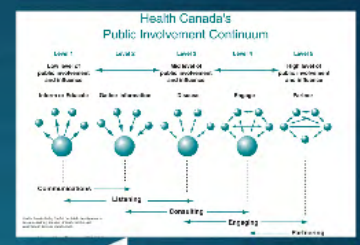
Stakeholder	Method
Patients	Focus groups
Healthcare providers	Interviews
Community	Surveys
Government	Policy analysis
Academics	Peer review

### Stakeholder Communication and Roles

Stakeholder	Role
Patients	Beneficiaries
Healthcare providers	Implementers
Community	Supporters
Government	Regulators
Academics	Researchers



## Engagement - What are we talking about? Levels and forms of engagement



U.S.: National Institute of Health

Level of Engagement	Form of Engagement	Examples
1. Inform	Public meetings, newsletters, websites	Public hearings, town hall meetings
2. Consult	Public surveys, focus groups, advisory committees	Public comment periods, advisory panels
3. Collaborate	Partnerships, joint decision-making	Public-private partnerships, community advisory boards
4. Empower	Community-led initiatives, shared decision-making	Community health workers, patient-led research



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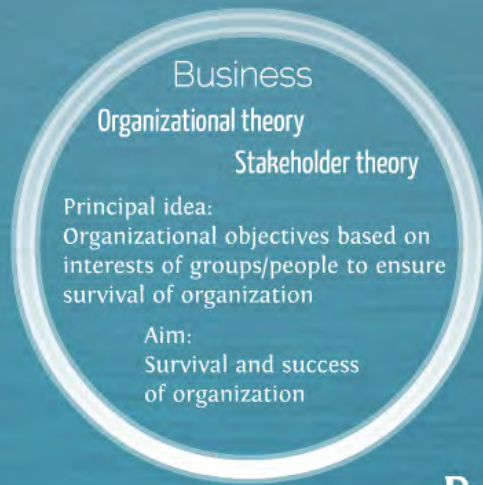
- Who are we?
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- What would you do?
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Enacting Mixed Methods  
Research in  
Primary Care:  
the critical importance  
of  
stakeholder engagement



# Engagement



Business  
Organizational theory

Social science  
Reflexive turn



Engagement in mixed-methods health research

Engaging stakeholders to ensure:

- Topics that matter to stakeholders
- End-user important outcome measures
- Effective implementation
- Access to contextual knowledge, access to key informants
- Translation/dissemination

# Business

## Organizational theory

## Stakeholder theory

Principal idea:

Organizational objectives based on interests of groups/people to ensure survival of organization

Aim:

Survival and success of organization



t

## Reflexive turn in social science

Participatory (action)  
community-based research

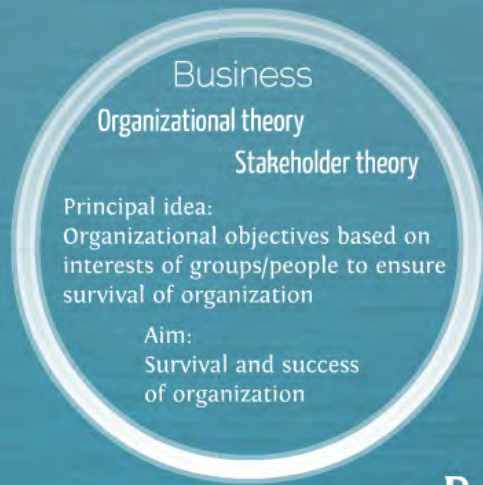
Principle ideas:

Mutuality, contextual reflexivity,  
reciprocity, collaboration,  
shared learning, negotiated meanings,  
plural knowledge

Aim: Social Justice  
leveling power relations

science

# Engagement



Business  
Organizational theory

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Reflexive turn



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# Engaging stakeholders

to ensure:

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- End-user important outcome measures
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# Engagement - What are we talking about?

## Levels and forms of engagement

U.S.: National Institute of Health

### Health Canada's Public Involvement Continuum

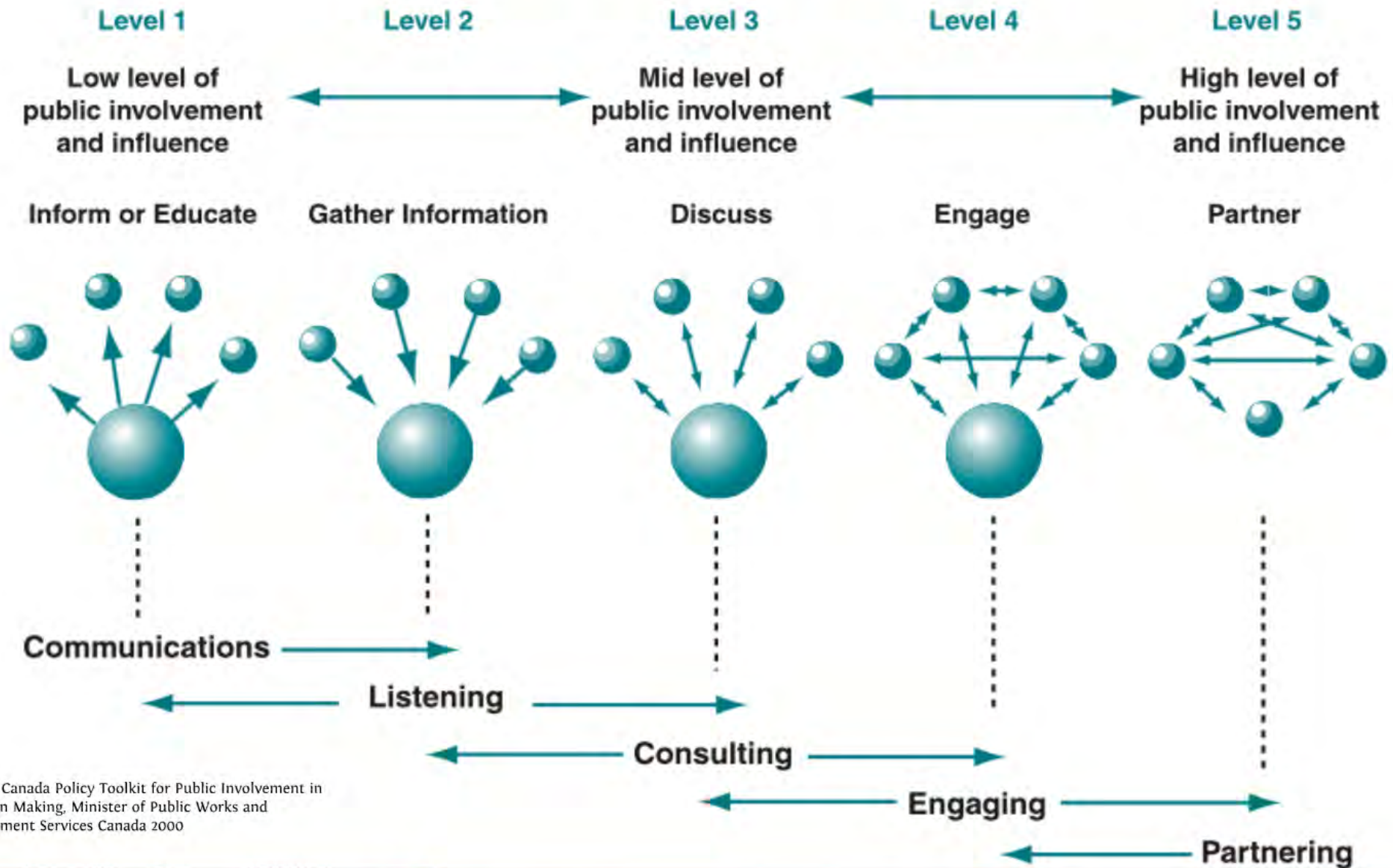


#### Increasing Level of Community Involvement, Impact, Trust,


<i>Outreach</i>	<i>Consult</i>	<i>Involve</i>
<i>Some Community Involvement</i>	<i>More Community Involvement</i>	<i>Better Community Involvement</i>
<i>Communication flows from one to the other, to inform</i>	<i>Communication flows to the community and then back, answer seeking</i>	<i>Communication flows both ways, participatory form of communication</i>
Provides community with information.	Gets information or feedback from the community.	Involves more participation with community on issues.
Entities coexist.	Entities share information.	Entities cooperate with each other.
Outcomes: Optimally, establishes communication channels and channels for outreach.	Outcomes: Develops connections.	Outcomes: Visibility of partnership established with increased cooperation.



# Health Canada's Public Involvement Continuum



# onal Institute of Health

Increasing Level of Community Involvement, Impact, Trust, and Communication Flow 

<i>Outreach</i>	<i>Consult</i>	<i>Involve</i>	<i>Collaborate</i>	<i>Shared Leadership</i>
<p><i>Some Community Involvement</i></p> <p><i>Communication flows from one to the other, to inform</i></p> <p>Provides community with information.</p> <p>Entities coexist.</p> <p>Outcomes: Optimally, establishes communication channels and channels for outreach.</p>	<p><i>More Community Involvement</i></p> <p><i>Communication flows to the community and then back, answer seeking</i></p> <p>Gets information or feedback from the community.</p> <p>Entities share information.</p> <p>Outcomes: Develops connections.</p>	<p><i>Better Community Involvement</i></p> <p><i>Communication flows both ways, participatory form of communication</i></p> <p>Involves more participation with community on issues.</p> <p>Entities cooperate with each other.</p> <p>Outcomes: Visibility of partnership established with increased cooperation.</p>	<p><i>Community Involvement</i></p> <p><i>Communication flow is bidirectional</i></p> <p>Forms partnerships with community on each aspect of project from development to solution.</p> <p>Entities form bidirectional communication channels.</p> <p>Outcomes: Partnership building, trust building.</p>	<p><i>Strong Bidirectional Relationship</i></p> <p>Final decision making is at community level.</p> <p>Entities have formed strong partnership structures.</p> <p>Outcomes: Broader health outcomes affecting broader community. Strong bidirectional trust built.</p>

Reference: Modified by the authors from the International Association for Public Participation.



# Levels of Engagement

Macro: health policy, system  
implementation

Meso: organization, management,  
communities

Micro: health professionals,  
patients



# What and who are stakeholders?

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Stakeholder

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Questions?

Thoughts?

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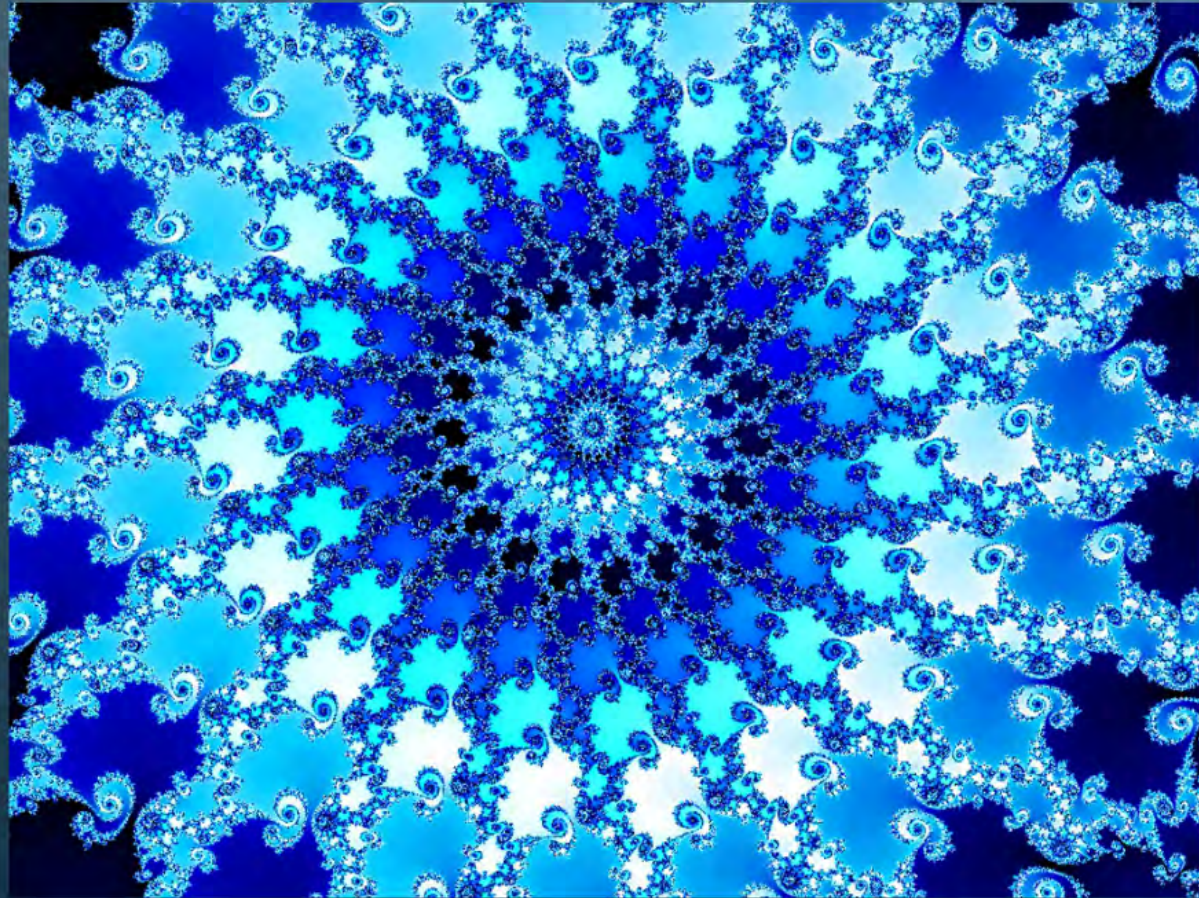
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A brief word about .....

## Complexity & Quality



Generalizability &  
Transferability



## Take-away messages..

[following group discussions of cases]

- Collaboratively formulating a research question is challenging; formulating specific research aims that reflect multiple stakeholder interests is even more challenging.
- Multi-methods research provides one strategy for attempting to accommodate multiple stakeholder interests.
- Researchers/providers are challenged to abandon control over the definition of the problem and the design of research/solution. There is a need to acknowledge that all stakeholders face a problem and come together to work on a solution.

# Resources

Research Toolkit: A toolkit for health research in partnership with practices and communities.

<http://researchtoolkit.org>

Jordan Z, McArthur A, McMillan M. Stakeholder Engagement: The Role of Tacit Knowledge and Value Statements in Translation Science. 2014.









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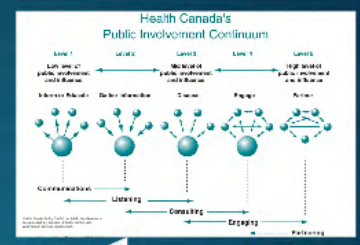
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## Engagement - What are we talking about? Levels and forms of engagement

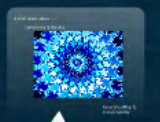


U.S.: National Institute of Health

LEVEL	DESCRIPTION	EXAMPLES	CHARACTERISTICS	ADVANTAGES	DISADVANTAGES
1. Inform	One-way communication of information to the public.	Public notices, press releases, fact sheets, brochures, websites, social media posts.	Low cost, easy to implement, wide reach.	Increases transparency, provides basic information.	One-way communication, limited feedback.
2. Consult	Two-way communication where the public provides input.	Public hearings, focus groups, surveys, advisory committees.	More structured than inform, allows for some feedback.	Provides more detailed input, shows public interest.	Time-consuming, may not represent all voices.
3. Involve	Two-way communication where the public is consulted and their views are taken into account.	Public advisory committees, public workshops, deliberative polling.	More structured than consult, allows for more feedback.	Provides more detailed input, shows public interest, more structured than consult.	Time-consuming, may not represent all voices.
4. Collaborate	Two-way communication where the public and the organization work together to develop solutions.	Public-private partnerships, community-based participatory research, co-design.	Highly structured, allows for significant feedback and input.	Provides the most detailed input, shows public interest, most structured.	Time-consuming, may not represent all voices.
5. Empower	Two-way communication where the public has decision-making authority.	Community-led research, patient-led research, community health workers.	Highly structured, allows for significant feedback and input, most structured.	Provides the most detailed input, shows public interest, most structured.	Time-consuming, may not represent all voices.



Thoughts about integrating different stakeholder agendas & integrating methodological rigour  
**Multi-method and mixed-methods**  
The complementary use of quantitative and qualitative methods (mixed methods) provides both tacit and explicit knowledge and the complex, social processes of research and implementation.



**Stakeholder Engagement**  
Stakeholder engagement is a process of involving stakeholders in the design, development, implementation, and evaluation of a program or project.

**Stakeholder**  
A stakeholder is any individual or organization that has an interest in or is affected by the actions of an organization.

**Stakeholder Perspectives and Methods**

Stakeholder	Perspective	Method
Patients	Quality of care	Surveys, focus groups
Providers	Workload, satisfaction	Interviews, observations
Community	Health equity, access	Community meetings, surveys

**Stakeholder Communication and Roles**

Stakeholder	Role	Communication Method
Patients	Beneficiary	Education, support groups
Providers	Implementer	Training, conferences
Community	Partner	Participatory research, advisory committees

# Stakeholder engagement

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