Engaging Stakeholders to Identify and Prioritize Topics for Future Research: Recommended activities and reporting practices

This table presents a series of recommended activities for researchers who are involving stakeholders in efforts to identify and prioritize topics for future research. Researchers can use this as a planning guide to ensure that they have the necessary information, processes and tools in place from the outset. It can also be used to track and report on stakeholder engagement processes and the results obtained. The recommendations presented are drawn from an AHRQ sponsored methods project to identify and describe stakeholder involvement in prioritizing future research needs.

Process	Activities	Reporting Checklist
Engagement Purpose	• State purpose of stakeholder engagement (e.g.,topic identification, prioritization, etc.) and desired results or outcomes (affects selection of recruitment, engagement, and prioritization methods)	✓ State purpose of stakeholder engagement
Stakeholder Orientation Information and Materials	• Provide orientation to the program (e.g., EHC and Systematic Evidence Reviews) • Communicate scope, aims, and desired product/outcome of engagement • Delineate stakeholder roles, responsibilities and expectations • Describe extent of commitment, including methods of engagement (e.g., single Webinar on a specific date), frequency of activities, project schedule • Explain compensation plan, if any (e.g., travel reimbursement, honorarium or other compensation) • Inform of conflict of interest disclosure requirements • Provide contact information for project team (e.g., e-mail address and phone number of investigator and research staff contact)	✓ Report conflicts of interest and disposition ✓ Report any compensation
Stakeholder Recruitment	• Develop a priori list of relevant stakeholder groups, including numbers of stakeholders for each group • Identify specific individuals within each stakeholder group to contact • Plan one or more methods of contact (e.g., write e-mail scripts or telephone dialogue to convey expectations of stakeholders) • Plan recruitment followup (e.g., repeat e-mails or return calls for refusals or non-respondents) • Contact individual stakeholders and document results of individual responses for calculation of overall response rates • Monitor stakeholder representativeness and distribution of stakeholder groups; add individuals to recruitment as necessary to ensure target stakeholder groups are included	✓ State the types and proportions of stakeholders targeted by group and rationale for recruiting each group (similar to inception cohort) ✓ Report methods used to identify, sample, and contact each stakeholder group ✓ Document recruitment dates ✓ Report invitation and participation rates (similar to response rate) ✓ Report distribution of stakeholders planned and recruited
Methods of Engagement	• Assess and identify engagement methods and criteria for selection for each stakeholder group based on: o Purpose of engagement o Characteristics of stakeholders to be engaged (e.g., geographic locations, numbers of stakeholders, range of perspectives, existing relationships among stakeholders, familiarity with research area or research prioritization generally, technological capacity) o Context of engagement (e.g., staff, time, budget, technological capacity, complexity of research area)	✓ Report engagement method(s) and describe process for the identification of research topics ✓ Document number and types of engagements ✓ Report participation rates and distribution in each engagement

Engaging Stakeholders to Identify and Prioritize Topics for Future Research: Recommended activities and reporting practices (continued)

Process	Activities	Reporting Checklist
Prioritization Methods	• Provide criteria for prioritization if previously established (by the sponsor or by previous engagement activity) • Document individual or group development of criteria for prioritization if not previously established	✓ Document prioritization criteria ✓ Describe methods of prioritization of research topics

Analysis and Synthesis	• Document, review, synthesize and report stakeholder research priorities
	  ○ Overall and by stakeholder group
	  ○ Weighting of input if applicable (e.g., do two votes from one organization count as one or two?)
	• Plan for review and validation of results by stakeholders to ensure their intended priorities are accurately communicated
		✓ Provide assessment of stakeholder representativeness
		✓ Provide details of synthesis and analytic methods including weighting of stakeholder group's responses and calculation of participation rates
		✓ Provide results both overall and by stakeholder group
		✓ Verify priorities with stakeholders

Conclusion	• Distribute final product or report to stakeholders • Express appreciation for participation and contribution • Gather input from stakeholders on engagement experience to evaluate the process • Advise stakeholders of opportunities for future participation and any plans for future contact (if relationship will be maintained)	✓ Provide prioritized list of future research topics (only after public posting/publication) ✓ Summarize lessons learned

Adapted from: O'Haire C, McPheeters M, Nakamoto EK, LaBrant L, Most C, Lee K, Graham E, Cottrell E, Guise J-M. Methods for Engaging Stakeholders To Identify and Prioritize Future Research Needs. Methods Future Research Needs Report No. 4. (Prepared by the Oregon Evidence-based Practice Center and the Vanderbilt Evidence-based Practice Center under Contract No. 290-2007-10057-I.) AHRQ Publication No. 11-EHC044-EF. Rockville, MD: Agency for Healthcare Research and Quality. June 2011. Available at: http://www.effectivehealthcare.ahrq.gov/ehc/products/200/698/MFRNGuide04--Engaging_Stakeholders--6-10-2011.pdf)