

STAR CRN Engagement Plan Checklist

Instructions: **All** PCORI grant proposals require [meaningful engagement](#) plans and [patient-centered](#) study plans. Structuring an engagement plan early in the process and addressing as many questions as possible on the front end will be beneficial to the proposal development process. The [STAR Engagement Leads](#) will review all study materials submitted to assess where guidance might be needed. The “Comments/Questions” column can be used when discussing your engagement plan needs with the STAR Engagement Leads, particularly at the initial STAR Intake Call. If a [STAR Advisory Council](#) (SAC) review is requested, all study materials submitted are provided for review and feedback. Please ensure that each checkpoint is addressed in the final draft of your engagement plan.

✓	Checkpoints	Comments/Questions
	1. Use the PCORI Engagement Plan Template to guide the development of your engagement plan. An Engagement Plan must be included in all PCORI applications to describe how the research team will be responsive to PCORI's Merit Review Criteria for funding. The Engagement Plan is evaluated as part of the research award application in the merit review process to assess the patient centeredness and engagement elements of the proposed research study.	
	2. Please describe the staff dedicated to leading engagement efforts and provide evidence of: 1) engagement experience, 2) expertise, and 3) appropriate effort percentage required for meaningful engagement over the life of the grant.	
	3. Review PCORI's comprehensive list of Engagement Resources.	
	4. The PCORI merit review criteria are outlined within each PCORI Funding Announcement (PFA). Please refer to the Merit Review section of the PFA document of interest. Review PCORI's Merit Review Process for a general overview. This information can help guide language and content while drafting the study proposal and engagement plan. Merit Reviewers include a broad range of experiences, backgrounds, and expertise (e.g., patients/families, community advocates, scientists, and healthcare organizations)	
	5. Please review the STAR CRN Engagement Guidance & Resources for Patient-Centered “Data-Only” Studies for guidance. All PCORI grant proposals require meaningful engagement plans including those that are data-only (secondary data analysis).	

	6. Please detail how your engagement plan addresses each of PCORI's Six Foundational Expectations for Partnerships in Research. • Representative Involvement: Projects should include partners, organizations, researchers, and other team members who reflect the range of patients and communities affected by the research topic. • Early & Ongoing Engagement: Projects should ensure that partners contribute early and throughout the study, including planning the study, conducting the study, and disseminating study results [including non-academic channels; review STAR CRN Person-Centered Return of Research Results for guidance]. • Dedicated Funds for Engagement & Partner Compensation: Projects should dedicate funds to support engaging with partners and compensate partners for their time, expertise, and perspectives in a timely manner and in ways that reflect their preferences and roles. • Build Capacity to Work as a Team: Projects should identify skills, strengths, and barriers to engagement and provide all team members with the information, training, and support they need to work as a team. • Meaningful Inclusion of Partners in Decision Making: Projects should use engagement structures and processes that include partners in decision making throughout all phases of the project, with consideration for the project's goals, scope, and scale. • Ongoing Review & Assessment of Engagement: Projects should gather input and feedback throughout the project to identify what is working well and what could be improved and then adjust engagement approaches as needed. <i>What were the results of engagement? What changed?</i>	
	7. Effective engagement requires Trust and Being Trustworthy. Please describe characteristics of the team that demonstrate trustworthiness and proposed activities that build and maintain trust and trustworthiness. (Characteristics of trustworthy researchers include being empathetic, accessible, approachable, honest, respectful, attentive, and humble.)	