RTAC Webinar #2 Transcript

Reaching the Right People at the Right Time:

How to Use the Research Translation Toolkit's Stakeholder Analysis Section

February 23, 2023

00:00:00.490 --> 00:00:13.170

Julie MacCartee: Welcome everyone. My name is Julie MacCartee and I'm a program officer with the Research Division within the Innovation Technology and Research Hub at the U.S. Agency for International Development, or USAID.

00:00:13.880 --> 00:00:28.550

Julie MacCartee: We're delighted to have you all joining us today for an in-depth. Look at the stakeholder analysis section of USAID's Research Translation Toolkit, which was developed under USAID's Research Technical Assistance Center, also known as RTAC.

00:00:29.509 --> 00:01:00.690

Julie MacCartee: Before we get started, just a few logistical points. Since we have a large number of people on the webinar today, we have turned off participants, videos and microphones. But we will be using and monitoring the chat box throughout the webinar. So, we invite yourself –er invite you to introduce yourself in the chat box. Let us know your name, affiliation, country of residence, and why you joined this webinar. And you're also welcome to use the chat box throughout the session to engage with your fellow participants, share your own examples, or your own resources.

00:01:01.130 --> 00:01:27.650

Julie MacCartee: You can send messages privately to other participants, but keep in mind that the webinar organizers will be able to see those private messages in the chat transcript at the end of today's session. So, while they're private during the webinar, they can be viewed after the session by the organizers. If you want to send a message to everyone, which is what we encourage, please just make sure that you've selected everyone in the little "To" section of your chat box.

00:01:28.420 --> 00:02:08.910

Julie MacCartee: However, we would like to direct you to the Q&A box feature to enter any questions you have as we go along about the toolkit. This will just help us keep the questions organized and make sure that we are seeing and responding to each of them. We'll answer some of your questions in writing along the way, and we also have a dedicated time at the end of the webinar to address your questions in the Q&A box. Finally, after today's webinar, you will receive a post-event email with the slides, the recording, and other resources. And you can also access those resources on our webinar website, and we will be sure to drop the link to the landing page for this series in the chat box.

00:02:12.040 --> 00:03:02.050

Julie MacCartee: Today's webinar is the second in a four-part series on how to use the Research Translation Toolkit. As a reminder, the Research Translation Toolkit is a comprehensive, standalone resource that can be used by anyone who wants to bridge the gap between research production and research utilization. It's divided into three sections: stakeholder analysis, communication products, and research-to-action plan. If you couldn't attend the first webinar, which was two weeks ago, it offered a comprehensive overview of the toolkit, and we encourage you to go back and watch the recording, if you would like, or look through the slides, which you can find on the webinar series website for your reference. I will also share a link to the Research Translation Toolkit itself in the chat box.

00:03:02.120 --> 00:03:43.330

Julie MacCartee: And finally, we've also developed a fact sheet that gives you kind of a quick snapshot of the toolkit, and it's really great for sharing. If you'd like to kind of promote the toolkit among your partners, your implementing partners, etc. So, we'll make sure that we share those in the chat and also in the post-event email.

All right. Onto today's objectives. Today we will discuss what the stakeholder analysis section of the toolkit covers. We will explain why, when, and how to use this section to increase the impact of your research by identifying and engaging with influential individuals and organizations who might use your research.

00:03:44.310 --> 00:04:08.490

Julie MacCartee: Unfortunately, our scheduled guest speaker, Dr. Jose Rodriguez from the Philippines, is unable to join us today, but he has shared what he learned from working with stakeholders throughout the research process. So, we're going to get to hear some of those insights. And, again, feel free to ask questions throughout the webinar using the Q&A feature, and we'll answer as many as we can after the bulk of the presentation.

00:04:10.840 --> 00:04:59.150

Julie MacCartee: All right, before we jump in, we just wanted to just wanted to touch upon what we mean when we say stakeholders. In the case of a research project, stakeholders are individuals and groups who influence, or are influenced by, your research. Stakeholders also include those who simply have an interest in the research. For example, government ministries are often stakeholders because they might influence or be influenced by research. Media often have an interest in the research and are influenced by it. Some other research stakeholders might include other researchers doing related activities, NGOs, donor organizations, workers in a relevant field, the general public.

00:04:59.520 --> 00:05:31.330

Julie MacCartee: Who am I forgetting? Feel free to share in the chat box other ideas of who you consider to be stakeholders. But, really, anyone can be a stakeholder in anything, but some are maybe more important to talk to and engage with then others in order to meet your goals. With that in mind., I'll now turn it over to Rachel Yavinsky from PRB to lead us through a quick exercise to frame where we're all coming from when we think of identifying and engaging with stakeholders.

00:05:31.960 --> 00:05:59.160

Julie MacCartee: Rachel is a senior policy adviser in international programs at PRB, and her focus is on facilitating information sharing through research –er –between research, practice, and policy through clear messages and innovative products. She has worked on topics including family planning, maternal, neonatal, and child health and population, health, and environment. So, Rachel, I'm excited to have you and to pass the microphone to you.

00:05:59.450 --> 00:06:33.940

Rachel Yavinsky: Thank you, Julie, and welcome everyone. I'm really glad to be here, and I'd like to start out by having a little interactivity. We want to hear about one challenge that you or your institution faces when it comes to engaging with influential individuals or groups that might use new research techniques or innovative products. We have shared a link in the chat. You all should be able to see a link in the chat that you can use to respond to this question. All of your answers will contribute to a word cloud. The bigger and bolder words are those that are mentioned most often.

00:06:34.030 --> 00:07:12.520

Rachel Yavinsky: This will help us get a sense of common challenges that are faced among today's participants. Since each response is limited to one word, we also welcome you to elaborate on your responses in the chat box, if you'd like to. So, I think you actually might have the ability to enter multiple responses, but each of those responses should be one word. There we go. Some of them are coming up.

00:07:21.230 --> 00:08:17.610

Rachel Yavinsky: I love watching this, especially as people see responses on the screen, and then are inspired to think of other ones. So I'm watching this change, and as more and more words come up, a lot of the words are getting smaller, but that one in the middle that just keeps staying there is "time." Time is a really big barrier for engaging different influential individuals and organizations. I also see “attention” is up there which, really, I mean, relates to time, sort of. There's a limited number of things that anyone can focus on, you know, with their time, their attention.

00:08:17.620 --> 00:08:44.630

Rachel Yavinsky: I see “apathy,” “identification,” “ownership,” –that's definitely really relevant to the stakeholder discussion. It's great. Thank you so much. That “time” really is there in the middle. “Attention,” “disinterest,” and “apathy” look similar. I think that's true.

00:08:49.070 --> 00:09:14.390

Rachel Yavinsky: So, thank you all for sharing. It's clear that we all face challenges when trying to engage with influential audiences who might be in a position to use new research to inform policies, programs, and practices, like the ones we just saw “time” and “attention.” The stakeholder analysis section is designed to help you address and overcome these challenges. So, let's take a deeper look at what this section covers. Why, you would use it, and how.

00:09:17.010 --> 00:10:12.660

Rachel Yavinsky: The stakeholder analysis section of the Research Translation Toolkit is intended to help you increase the impact of your research insights or technical innovations by identifying and prioritizing influential individuals or groups who might be interested in and benefit from influence or use your research. It also helps you plan effective engagement with these stakeholders.

Why should you use this section of the toolkit? It can be used for several purposes. You can use this section to understand your stakeholders’ interests, influence, motivation, and knowledge of the subject matter. This section can also help you determine which stakeholders are the most important to engage in the research process, and when and how to engage them. And finally, this section contains tips and a guide for how to interview your stakeholders.

00:10:14.960 --> 00:10:55.490

Rachel Yavinsky: You may recognize this graphic from the first webinar, if you participated in that. When we went over where in the research project process you can use the various sections of this toolkit. Here, we've modified it to focus on where in the research process you could use the stakeholder analysis section to identify and engage with your stakeholders. You can see that the stakeholder analysis section is very important at the beginning of the research process when you are developing your research questions. Using this section as early as possible gives stakeholders an opportunity to give their input before your research questions or approach are finalized, which establishes strong engagement and support from the start.

00:10:56.480 --> 00:11:25.260

Rachel Yavinsky: Since stakeholder roles may vary at each stage of the research process, the stakeholder analysis will be useful at each step to ensure that engagement is an ongoing, iterative process that continues throughout the project. For example, during the research question development stage stakeholders may help identify potentially overlooked opportunities or problems, so that they can be addressed early in the process. During the analysis and write up stage, stakeholders can help review final results and adjust key messages.

00:11:28.220 --> 00:11:48.690

Rachel Yavinsky: There are five main steps in the stakeholder analysis section. Working through the steps will take you from identifying and prioritizing your stakeholders to planning and tracking engagement with them. There are a variety of resources and tools available to support your learning and implementation of stakeholder analysis. We'll go over each step in more detail in the next slides.

00:11:58.680 --> 00:12:41.090

Rachel Yavinsky: The goal for the first step is to identify a wide and diverse range of potential stakeholders by asking a set of basic questions to help you think about who might be interested in and benefit from, influence, or use your research. For example, who might be negatively affected by the research, or who has an interest in the research, including the competitors.

In this step you are encouraged to be inclusive to make sure you aren't overlooking any stakeholders. You will narrow this list down to in the next step. It's also important to consider groups and individuals in different categories, such as government, donors, funders, or private sector businesses, and in different spheres of influence, including global, regional, and national.

00:12:42.650 --> 00:13:10.880

Rachel Yavinsky: Acknowledging that stakeholders' expected roles and contributions vary at different stages of research, this is where you're also asked to think about the different roles of stakeholders at each stage of the research process to be sure you're identifying all relevant stakeholders. For example, during the research question development stage, stakeholders might help identify potentially overlooked opportunities or problems, and during the analysis and write up stage, they can help review final results and adjust key messages.

00:13:13.550 --> 00:13:58.720

Rachel Yavinsky: A stakeholder identification worksheet accompanies this step to help you create a list of stakeholders by filling in information on the type and reasons for engagement of each individual and group on your list. For example, if one of your stakeholders was the Ministry of Health, you would put "government" in the "Category" column and "national" under "sphere of influence." Under potential influence on the project, you might write, “They can make the change to the policy that we want.” Of course, you can also be more specific about what that influence could be. And under “potential interest in the project,” you might write, “They can ensure that our research is conducted rigorously, and have early access to the latest evidence on the topic, as it becomes available from our research.”

00:14:01.220 --> 00:14:56.090

Rachel Yavinsky: After you develop a list of potential stakeholders for your research, Step 2 is to decide which ones are the most important to engage. Unfortunately, we don't always have the time—that keyword again—and resources to engage with the full continuum of stakeholders, and sometimes certain stakeholders are easier to engage with than others. For various reasons, in this step you will prioritize the stakeholders on your list based on their level of interest in your research and influence in sectors or contacts where your research insights and innovation might be used.

Does your stakeholder have a high or a low interest in your research, regardless of whether they support or oppose your findings? And do they have a high or low level of influence on the research, either positively or negatively?

This step is critical to ensuring that you are directing your time and energy to maximizing the impact of your stakeholder engagement.

00:14:58.720 --> 00:15:32.350

Rachel Yavinsky: This step has two worksheets to guide you through the process of prioritizing stakeholders. On this first worksheet, you will categorize each stakeholder from your initial list, according to their level of interest and level of influence, either high or low. For example, a local environmental civil society organization might have high interest in research on degradation of tropical forests, but low influence on the research. Whereas logging industry representatives will likely have a high level of interest in the research, regardless of whether they support or oppose your findings, and high influence.

00:15:35.320 --> 00:16:11.820

Rachel Yavinsky: With the information from the stakeholder prioritization worksheet, you will then map stakeholders onto the stakeholder mapping matrices on the second worksheet. The matrix plots levels of influence against levels of interest. This section of the toolkit guides you through interpreting the matrix to determine the importance and level of engagement with each of the stakeholders you identify, allowing you to order your complete list by priority. Stakeholders who are both high interest and high influence are the most important for a project, and need to be engaged fully, including, possibly involving them in some decisionmaking.

00:16:14.460 --> 00:16:42.900

Rachel Yavinsky: Step 3 is to better understand the knowledge and motivations of the stakeholders you prioritized in Step 2 so you can determine how to engage with each stakeholder more effectively. This step describes important additional information to gather on each stakeholder. The worksheet that accompanies this step will allow you to clearly organize all your information as you collect it. Each column is dedicated to a specific piece of information.

00:16:43.180 --> 00:17:42.110

Rachel Yavinsky: The information includes: existing relationships among stakeholders, such as noting the Ministry of Health relationship with an NGO that is also a stakeholder; the level of knowledge a stakeholder has about the research topic or project, from uninformed to familiar to expert; stakeholders' views on the research topic or project, whether positive, neutral, or negative; each stakeholder's preferred means of communication, for example, in person, by phone or email; each stakeholder's level of interest and motivation, from high to medium to low; a stakeholder's capacity to engage in the project, from high to low.

For example, will they be part of the core team, regularly consulted, or occasionally informed?

If they have limited capacity to engage their possible constraints, and what can be done to increase their capacity? For example, you might note, "staff has limited time. We can keep the meetings short."

00:17:45.940 --> 00:18:19.870

Rachel Yavinsky: You likely won't already have the information needed to complete the previous worksheets, so interviews are another useful way to build understanding of your stakeholders. While some of this information can be found online or via media sources, we strongly recommend that you include interviews as part of your stakeholder analysis process. Stakeholder interviews can be conducted using a set script and predetermined questions, or in a more unstructured way. In either instance, we encourage research teams to ask open-ended questions rather than questions that can be answered with a yes or no.

00:18:22.190 --> 00:19:14.480

Rachel Yavinsky: Here are a few tips as you plan and conduct interviews. First, we recommend conducting your interviews early in the analysis process. This allows you to reflect any lessons learned in the remaining research stages. It is also helpful to conduct interviews at different stages to gather information on specific issues that come up. You should also prioritize your interview questions so you can be sure to ask the most important ones. Important questions are typically those that ask about information that cannot be found elsewhere. Also, be sure to focus on listening to the person you're interviewing versus talking—that's a hard one. Next, follow the conversation —that is, pay attention to the direction it's heading. Finally, adapt as you go, skip questions as appropriate. You don't need to ask every question exactly as it was written.

00:19:15.680 --> 00:19:57.180

Rachel Yavinsky: In addition to the worksheet we looked at a moment ago, this step of the stakeholder analysis section also has a stakeholder interview guide, sample scripts, and sample questions. The guide walks you through each of the four broad processes involved in planning for and conducting interviews, scheduling the interviews, preparing the interview tool, conducting the interviews, and analyzing the interview results. The sample script and questions offer examples that you can model your own interview on. Once you have prioritized and built a solid understanding of your stakeholders, Step 4 helps you plan how and when you want to engage with each stakeholder throughout the research project process.

00:19:57.680 --> 00:20:27.950

Rachel Yavinsky: As we mentioned earlier in the webinar, the level of stakeholder involvement will likely vary at different points in the research process depending on the stakeholders' expected role and contributions. In this section, you will specify each stakeholder's role, the point or points in the research process when they should be engaged, and the way in which you plan to engage them. This step contains tips for selecting a mode of engagement for each stakeholder, and examples of when the different modes might be most helpful.

00:20:31.180 --> 00:20:56.150

Rachel Yavinsky: This section of the toolkit provides two resources to support stakeholder engagement planning. The first is a worksheet that helps you compile all the relevant information related to when and how you want to engage your stakeholders. The worksheet has columns for each of the main stages of the research process since you may wish to engage the same stakeholder in different ways at different points in the process.

00:20:56.790 --> 00:21:34.400

Rachel Yavinsky: Returning to the example of the Ministry of Health as your stakeholder, in the research Question Development stage, the activity may be asking them to review and provide feedback on your research questions before you finalize them. The way that this activity is organized—that is, the mode of engagement— may be a small group, in-person meeting at the Ministry offices.

You may also add activities to keep them involved during data collection stage, for example, sharing biweekly progress updates by email. And during Dissemination and Follow-up—for example, by asking for assistance with outreach to end users via workshops in different locations.

00:21:36.570 --> 00:22:14.100

Rachel Yavinsky: The second resource in this step is a template you can use to develop your own short term stakeholder engagement plan. This template helps you develop a specific plan over 12 months, inputting the activities outlined in the worksheet. Referencing the worksheet from this section, you will identify the project stages for which you are planning the stakeholder engagement activities. Then you will list stakeholders you plan to engage with, and the activities through which you will engage them, followed by how to track progress and measure success. This section also includes a sample template that has been compiled to illustrate how this resource can be effectively used.

00:22:16.770 --> 00:22:56.890

Rachel Yavinsky: The stakeholder analysis process does not stop with stakeholder engagement tracking. I'm sorry— engagement. Tracking that engagement is an important additional step, which you will complete in step 5. Tracking and measuring success of stakeholder engagement during a project enables the research team to assess engagement efforts and make improvements as needed. This helps you to consider if the stakeholders you've identified are reacting in ways that are supportive of your research, and if not, how you might change your approach. This section helps guides you through establishing a monitoring plan by defining indicators that make sense for your project, and by planning data collection around those indicators.

00:22:56.910 --> 00:23:37.390

Rachel Yavinsky: This section helps guide you through establishing a monitoring plan by defining indicators and planning how to collect data on those indicators to support tracking and assessment of stakeholder engagement efforts. This section includes a stakeholder engagement tracking plan worksheet. Using this worksheet, you will identify your stakeholders, the purpose and objects an objective—excuse me—the purpose and objectives of engaging them, and planned engagement activities. The worksheet then asks you to consider what success looks like. That is—what is the output of your activities if you achieved your purpose or objective—and determine what would be an observable measure of success.

00:23:37.520 --> 00:23:57.650

Rachel Yavinsky: For example, if one of your activities is to hold a dissemination group advisory meeting, your output would be the number of stakeholder organization representatives who participate in each meeting as an indicator of progress. An indicator of short-term success might be whether the advice from the group enabled your team to make improvements to your dissemination strategy.

00:23:59.020 --> 00:24:54.360

Rachel Yavinsky: As previously mentioned, our scheduled guest speaker, Dr. Jose Rodriguez, won't be able to join us today. However, he shared his takeaways and lessons with us so we can share them with you. Dr. Rodriguez is a public health specialist, with more than 20 years' experience in the design, implementation, and evaluation of public health programs in the Philippines and other countries in the Southeast Asia region. He is currently working as an international public health specialist for a health security project in the People's Republic of China, funded by the Asian Development Bank.

Dr. Rodriguez has worked with research teams in the Philippines that use processes from the Research Translation Toolkit in their efforts to amplify the reach and impact of their research. Now my colleague, Jill Chanley from PRB, is going to stand in for Dr. Rodriguez to share his lessons learned from engaging with stakeholders in the Philippines.

Hi, Jill! Welcome.

00:24:54.390 --> 00:24:55.560

Jill Chanley: Hello!

00:24:57.460 --> 00:25:05.540

Rachel Yavinsky: So, let's just get started. Dr. Rodriguez has worked with several research teams under our attack. What did he say has been his biggest takeaway?

00:25:06.270 --> 00:26:07.300

Jill Chanley: So, Dr. Rodriguez says that, in general, he's found that researchers are actually very interested to transform the research into something that's more meaningful rather than just getting their studies published in scientific journals. But he also says, unfortunately, few research teams are actually familiar with this research-to-action process and structure. He's worked with give USAID-supported research teams and while he says this sample size is maybe, it's a little too small, his general impression is that working with university-based researchers, is that they are highly motivated people, and they have a strong desire to see real people benefit from their work, but they don't really know about the business of translating research to action. And so, for him, he said, that's why this RTAC research-to-action process and the tools that have been developed are really crucial and really help researchers know that, as he says, that there is a method to the madness.

00:26:08.220 --> 00:26:22.630

Rachel Yavinsky: So, researchers are really interested in making difference, but few are familiar with the research to action process and structure. What does he have to say about his experience of incorporating a stakeholder analysis into the research process?

00:26:23.560 --> 00:27:29.900

Jill Chanley: So, he emphasized that program ownership by the decisionmakers can never be overestimated. One story that he wanted to share with researchers was about a very successful attempt by a project that he led. This project was developing a blended training for family planning providers in the Philippines, and the training program that they developed not only reduce the training time from 28 days to 7 days, but it also resulted in huge cost savings of more than 80%. And so, this was all done without affecting the quality of the provider skills. So, despite all of this success, he says, the only mistake which he also says was a colossal blunder on the part of the project, was their failure to meaningfully engage the Department of Health in the process of developing this new training program. when they presented the results to the Department of Health, they were soundly rebuffed, because the technical staff and officials had a lot of questions about the methodology for the training.

00:27:29.930 --> 00:27:50.270

Jill Chanley: And although the methodology was very sound, he says that the damage was already done because there were strained relationships between partners, and it ended up being too difficult to overcome. And he says like this was a very painful lesson for their project, but one that he always tries to emphasize when he works with researchers now.

00:27:51.950 --> 00:27:58.280

Rachel Yavinsky: So how has he or the teams he's worked with approached the first stage of stakeholder identification?

00:27:59.320 --> 00:28:39.240

Jill Chanley: So, he says that one of the most important insights that he's gained is that, in advocating for policy change, researchers really do need assistance in understanding the policy context and policy landscape. Because often this policy arena is a completely different world from the one in which researchers find themselves. So, having somebody that's knowledgeable to kind of guide them in navigating this strange environment, it's very much welcomed. And so, to illustrate this point, he shared that he was working with a research team that was attempting to document the presence of antimicrobial pollutants in marine and aquatic bodies in the Philippines.

00:28:39.990 --> 00:29:36.160

Jill Chanley: This research team was from the University of the Philippines Marine Science Institute was able to confirm the presence of high levels of antimicrobial contamination in selected marine and aquatic bodies in the islands of Luzon and Mindanow. And he said that these findings are really important from a public health perspective, because they contributed to the increasing burden of antimicrobial resistance. And this team was able to trace the source of the contamination to hospitals which, ironically, were owned and operated by the Department of Health. And so, the team members tried to contact the—when they tried to contact the Department of Health, they were surprised to learn that there were actually five different offices belonging to three different bureaus in the Department of Health who are exercising some form of oversight over these hospitals. So that was something that they didn't know off the bat.

00:29:36.390 --> 00:30:11.640

Jill Chanley: And, as often happens in a large bureaucracy, he says the team was shuffled from one office to another and they became quite frustrated. But, luckily, he was able to refer them to a key informant who was able to guide them to which of the DOH offices that they needed to engage with, and that really save them a lot of wasted time, effort, and resources. So, finding somebody that can kind of help understand the policy landscape and understand the players, and can kind of be that guide for researchers.

00:30:13.920 --> 00:30:21.350

Rachel Yavinsky: So, when selecting stakeholders to engage, how has Dr. Rodriguez decided which stakeholders to prioritize?

00:30:22.290 --> 00:31:22.970

Jill Chanley: So, Dr. Rodriguez says that it's important to prioritize those that have the authority to make decisions, and who have demonstrated an interest in the subject matter. He was working once with a research team in the Philippines who was working on childhood tuberculosis, and this team was able to identify some gaps in the existing guidelines and policies in identifying children who are vulnerable to the disease.

So, the team wanted to bring this problem to the attention of the appropriate authorities, and they selected the Department of Health Deputy Minister, who exercised management oversight to the National Tuberculosis Control Program. And so he was the primary stakeholder. And this person actually used to be a manager of the TB Control Program when still a middle manager in one of the administrative. And so, because of this, this person was a strong advocate for increasing resources for childhood tuberculosis, because of their previous assignment.

00:31:23.300 --> 00:32:12.840

Jill Chanley: So, having that background information was really critical, and again, that was shared by a key informant who was a technical staff member in the office of the Deputy Minister, and they identified that critical staff member, or that key informant, as a secondary audience. And so, the team's decision to prioritize the Deputy Minister as a key primary stakeholder was very crucial to their success because it offered them opportunities to make an important contribution to the National TB Control Program. So, Dr. Rodriguez, his kind of take away from that experience was that running a thorough background check on all of your identified stakeholders is really important, and it can make a world of difference.

00:32:13.430 --> 00:32:39.320

Rachel Yavinsky: Okay, before going into the next question, I'd just like to highlight some points that are being made in the chat. "Dr. Rodriguez's blended training example speaks to the importance of early stakeholder analysis and engagement. There are many similar stories from other projects." And "The Department of Health example illustrates just one way in which help from someone outside the research team is often important. Someone who is knowledgeable about the policy actors and who has contacts can be an important catalyst."

00:32:40.720 --> 00:32:57.310

Rachel Yavinsky: So, what has been Dr. Rodriguez's experience with stakeholder interviews? Specifically, when in the research process did he conduct stakeholder interviews, and how have they helped him advance the application of the research in cases like this, and how did he best take advantage of these opportunities?

00:32:58.410 --> 00:33:40.150

Jill Chanley: So, Dr. Rodriguez says that conducting stakeholder interviews is where the rubber meets the road and he says, translating research to action is a substantial amount of time, and you spend a lot of time developing the R2A plan and starting with the formulation of goals and objectives. And he said, it's okay for that—to spend that amount of time because you need to set the direction and familiarize yourself with what you need to achieve your objectives. But actually, one of the most important aspects is actually implementing and going out into the field to meet the stakeholders. And that's kind of where your theoretical plan gets to take shape in a more concrete matter.

00:33:40.580 --> 00:34:20.500

Jill Chanley: Dr. Rodriguez told us that he's a big fan of stakeholder interviews because they can sometimes open up doors for policy change to happen. As an example, one team that he worked with in the Philippines working on childhood tuberculosis—so that's the example that I previously mentioned—he said that they were pleasantly surprised when the Department of Health official that they were interviewing actually invited them to join a technical working group that was just recently organized by the Department of Health. And this technical working group was working on revising the TB Control Manual and childhood tuberculosis was one of their key sections that they were revising.

00:34:20.500 --> 00:34:48.520

Jill Chanley: So, because of this interview with a stakeholder, they were able to learn the importance of timing with stakeholder engagement. If they hadn't had engaged the stakeholder at that time, they wouldn't have been able to contribute to this process in the way that they wanted to. And he says another important lesson learned here is that when an opportunity presents itself, the team should be ready to jump right in and seize that opportunity.

00:34:49.310 --> 00:35:08.620

Rachel Yavinsky: Great, thank you. Conducting stakeholder interviews is where the rubber meets the road. That's what I've heard Dr. Rodriguez say before; he really preaches the importance of the use for his work. Can you tell us a little bit about his experience engaging stakeholders that might be overlooked or underrepresented?

00:35:09.320 --> 00:35:43.030

Jill Chanley: Yes. He says that the best policy advocates are oftentimes the program beneficiaries themselves. So one of the things he says he likes to do when working with research teams is to share stories, because stories about successful advocacy efforts can also become lessons learned. And what he also— He thinks it's important to emphasize stories where there's some type of failure involved. So one story he likes to share is about a successful project that aimed at reducing teenage pregnancies in the Philippines.

00:35:43.440 --> 00:36:28.440

Jill Chanley: He says that prior to the intervention, there were many adolescent girls who were delivering in hospitals, but they were not offered family planning services, and many of them would become pregnant again within the next two years.

And so, their project not only helped them to prevent another unintended pregnancy during their teens, but it also helped them continue their education by using an alternative learning system that was developed by the Education Ministry and also helped them access vocational skills training. So the project was very successful, and the project staff tried their best to promote the program to other hospitals and decision makers. But there were very few takers, and so

00:36:28.500 --> 00:36:50.630

Jill Chanley: Dr. Rodriguez says they tried a different approach, and they asked themselves if maybe the girls themselves would actually be more credible and effective program advocates. So, they recruited some of the most successful graduates of their program, who they called program champions, and these became program advocates, and they found that the results were incredible.

00:36:50.840 --> 00:37:27.710

Jill Chanley: And he was saying, you know you can imagine, these are very young girls, maybe 18 or 19 years old, and they're speaking during technical conferences to audiences of high-level officials. He said, you think that they would be in awe, but actually, when they began sharing their experiences and their personal stories, they really spoke from the heart. And, as a result, their project was inundated with requests from many hospitals to introduce the program in their institutions. And he says that this team learned a very valuable lesson about never underestimating the power of a passionate and satisfied program beneficiary.

00:37:29.880 --> 00:38:36.540

Rachel Yavinsky: That's great. Thank you. It's—I wish we could have heard from Dr. Rodriguez himself, but I know that these are all points that he finds really important. So, thank you so much for sharing.

So, I also want to say there is a video on the RTAC website. I'm not sure if the link has been posted here. It was included in a previous webinar. Where a research team that participated in this process in India talks about their experiences and the benefits, and I think it's really well done. Really interesting. Can help answer some of these questions from the chat. Another aspect of engaging stakeholders, stakeholders may ask researchers to rate non-academic items, policy briefs technical papers for the government etc., and you know that's great, and it, although it's important to then, you know, use your skills in writing those kind of nonetheless non- academic papers, and some of actually the other toolkit sections can help support you in that process.

00:38:36.840 --> 00:38:57.810

Rachel Yavinsky: We do have another question in the chat, but I think we're about to launch into a question section, so if we can wait just a moment, because Julie is going to facilitate that question, that part of this webinar. We will move on. Thank you so much so, and thank you everyone.

00:38:59.710 --> 00:39:26.340

Julie MacCartee: Sounds good. Thank you, Jill, so much for stepping in. Those were really wonderful insights. I agree, I wish that Dr. Rodriguez could have been here, but his—because reflections were really useful, and I think they'll be useful in the post-event resources with the transcript, and notes, and such—useful for participants to kind of digest a bit more. I know that I would like to spend some more time digesting his experiences and recommendations.

00:39:27.570 --> 00:40:09.700

Julie MacCartee: All right. We have entered the official question and answer portion of the webinar today, so we're happy to engage in a bit of a discussion on the stakeholder analysis section of the toolkit. If you have any just logistical questions about how to download it, how to use it. What's in it? We're happy to answer those. Also happy to address some broader questions about engaging stakeholders and the kind of good practices that we're aware of. We also encourage you to share your own good practices, or even mistakes you've made in the chat, because we all learn, honestly, better from mistakes sometimes than from someone just telling us what's the best.

00:40:11.260 --> 00:41:06.230

Julie MacCartee: And let's see, I think the question, Rachel, you were mentioning in the chat. Is it the one from Jenny Sagin. Oh, yes, which I think also went into the Q&A box. Let me double check. Exactly. Great.

Well, we'll start with that most recent question which I know is addressed by Marlene in the, in the chat box—er in the Q&A box. But I'll bring it forth also.

And Jenny wanted to touch upon how transferring scientific research works, how we transfer or translate all of this scientific language into user friendly applications that are easy to understand by ordinary people so that's more connected to technical and vocational education and training in school-based training programs.

00:41:06.570 --> 00:41:39.070

Julie MacCartee: And Marlene points out that the art of transferring science publications into user-friendly products understandable by ordinary people is a skill that can be learned. It does require access to science, professionals to explain some important nuances, and our toolkit outlines how to use and engage communications professionals to write short reader friendly briefs. So in a nutshell, our webinar next Thursday focuses on the Communication Products section of the Research Translation Toolkit.

00:41:39.230 --> 00:42:21.730

Julie MacCartee: And that section gets much more in depth about how to decide upon and craft your main messages. What those core points you want to get forward are, how to write in a concise user-friendly way that doesn't use too much technical jargon. What types of formats are most preferred and most understood by various stakeholders. So, we will get into that much more next week. But I'm glad that you raised the question, because it does relate a lot to stakeholder analysis, as you are identifying stakeholders, deciding who to prioritize, you should also be thinking in your mind—

00:42:22.250 --> 00:43:14.600

Julie MacCartee: What are the different communication needs of these different stakeholders? How much technical language can they understand or digest? How much time do they have? And then it really can—communications is, of course, a scale. And sometimes the best route is to engage a communications professional whose job it is to turn scientific language into something you should understand.

In other cases, it can be done by anyone who kind of has that goal of distilling the main messages. So, we will get into that next week. I do like the idea also, though, of including that sort of training in any sort of scientific training program, that science communication is an important part of science, and shouldn't be overlooked.

00:43:17.540 --> 00:43:37.270

Julie MacCartee: Alright, so, looking at our questions, so please continue to put your questions in the Q&A feature. We have time to answer a few more. But we can also address the ones that have already been answered in writing and see if we have any additional thoughts.

00:43:40.490 --> 00:44:13.960

Julie MacCartee: I really liked the question from an anonymous attendee acknowledging that stakeholder mapping, it seems like it could deprioritize local organizations' inputs. Is there any check in place after mapping to ensure representation from local organizations? And I see Marlene notes that you can sort stakeholders by category, and, for instance, have a category for local organizations, and then prioritize within categories.

00:44:14.920 --> 00:44:20.660

Julie MacCartee: Are there any other insights from our panelists on kind of how to make sure that you are capturing not just the big, obvious stakeholders, but capturing kind of more local organizations, or maybe more marginalized groups and continuing to prioritize them.

00:44:47.550 --> 00:45:38.090

Jill Chanley: I think that helping— just keeping it in mind can be really helpful, because it's an intention that you're setting as your embark on this project. So, keeping it top of mind, is already one step towards doing that.

And as we saw through Dr. Rodriguez's experiences, I think you know, learning more, developing your network from stakeholders –kind of that snowball effect—can really be helpful to identify groups that maybe you're not aware of, especially if they're working at a more community level. And I think that's one way to just continue building your knowledge. And yeah, I'll see if Rachel has any other thoughts. You're on mute, though, Rachel.

00:45:38.560 --> 00:46:25.380

Rachel Yavinsky: Of course. Thank you. I just wanted to add that I've actually worked with several research teams who have—in development of their communication objectives, and that's something for it. That's part of a different section of the toolkit. But in developing their communication objectives they realize that. You know, based on what they're researching and what they're trying to do with it. One of their communication objectives is to encourage the stakeholders that really have a lot of power to listen to the voice of local communities about whatever their topic is. So actually, as you're doing this, so one of the things that you could be working to achieve is to increase the influence of those local individuals and communities and organizations.

00:46:29.600 --> 00:46:52.660

Julie MacCartee: Great. Thank you both. And I agree just that intentionality is so fundamental to anything like this. Having that intentional goal of prioritizing more marginalized groups goes a long way.

00:46:56.930 --> 00:47:42.150

Julie MacCartee: And I see Sutherland posted in the chat, "I think it is important to focus on who may be opposed to the implementation of research findings as many times they challenge the status quo and imply changing current business practices or policies." That's an interesting point, Sutherland, that it's instinctive, perhaps, to when thinking of stakeholders, think of everyone who may be supporting or research, or can make all the positive changes that you're interested in, and kind of forget to list and engage with those who may have opposing views to your desired view. That's very important.

00:47:45.290 --> 00:48:08.070

Julie MacCartee: And I wanted to flag that Marlene asked a question to all of you in the chat. Has anyone here had experiences with stakeholder workshops?

How useful have those been as opposed to one-on-one engagement? Because, certainly, a larger workshop or a focus group you might actually get different types of responses than one-on-one interviews. So, if you have any experience, please do share.

00:48:18.200 --> 00:48:58.810

Julie MacCartee: I'd also like to acknowledge that this can be a challenging process, and we want—we just want to acknowledge that it can be hard and tiring, and take a lot of effort and resources to do stakeholder analyses. But… and certainly to engage stakeholders. There's a reason that we may need to prioritize. We can't reach out to everyone. You can't necessarily engage with every possible influence or a stakeholder. But thinking it through really helps us get more reach and more utilization for research outputs.

00:49:02.300 --> 00:49:26.330

Julie MacCartee: Has anyone on the webinar who's attending today used any of these tools already, or done in any of these processes? We'd love to hear your experiences if you've done so. I know we may have a few alumni from previous RTAC processes here on the webinar.

00:49:39.300 --> 00:50:27.630

Julie MacCartee: Alright. In the meantime, and somewhat on that note, we still have a few more minutes for questions, but we'd also just like to know how you plan to incorporate the information and tools from this section in your work or at your institution.

And so, on the next slide we want to just spend a moment asking you how you will use this section in your own work. As before, we're going to put a link in the chat that you can use to add your answer, and you can also add a thumbs up to other participants' answers if you kind of agree, or would like to support their responses.

00:50:28.580 --> 00:50:55.050

Julie MacCartee: So please take, please do take a moment to click through to that link. This can be anonymous. You don't have to use your real name and let us know how you plan to incorporate the information from the stakeholder analysis section of the research translation toolkit in your work or at your institution. We'll wait a few moments for some responses to come in.

00:51:03.190 --> 00:51:46.380

Julie MacCartee: I see one person intends to use this section to help refine research questions by engaging stakeholders. Wonderful!

Someone would like to hold a training for all of our research staff. That's exciting to hear. We'd love to hear how that goes, or if you need any support. Certainly these tools in the toolkit are open for your use. You can train others on them. Use them, however, you wish their full open usage.

Someone plans to make stakeholder analysis and engagement more systematic, using the toolkit. Yeah. So rather than kind of random, have more of the strategy.

00:51:48.390 --> 00:52:11.320

Julie MacCartee: I see training researchers and how to do a stakeholder analysis map for research, translation. Wonderful. That's exciting.

Creating dissemination plans for research activities—great! Knowing that that map of which stakeholders need to receive the results of your research.

00:52:13.990 --> 00:52:52.980

Julie MacCartee: I see one response that says “Map out who is affected by regulatory change, who needs to change the way they work, and figure out who our allies may be in the ministries.” Wonderful.

Great! Thank you for these responses. It's exciting to see some intentions or goals regarding stakeholder analysis. Just a few more came in, identify new audiences.

00:52:53.290 --> 00:53:22.000

Julie MacCartee: Train teams in systematic dissemination of information. And one attendee has already used stakeholder mapping but would like to use these tools to create a more comprehensive and intentional plan, especially for including stakeholder voices and feedback throughout project stages. Great! I think that's exactly what we hope that you'll be able to do with these tools.

00:53:23.830 --> 00:54:13.910

Julie MacCartee: Form a stakeholder advisory group for projects, even when it isn't required. Yeah, sometimes an advisory group creating that ownership, making people feel like they have a personal or work-related stake in the research right at that outset goes a long way. I get really hung up on ownership. I find that to be very important in the development sphere, feeling that you have some sense of responsibility towards the topic at hand.

And finally, understanding what stakeholders goals are, which might be different and conflicting absolutely, and how the research findings can help them achieve their goals and making things more systematic.

00:54:14.050 --> 00:54:38.780

Julie MacCartee: Great, thank you. Well, we would love to also hear if the toolkit does help you, if it has been effective, if you've used it and have a great story to share, whether it's a success story or a lessons learned story, we'd love to hear your stories about using the stakeholder analysis section or other sections of the toolkit in your work.

00:54:39.040 --> 00:55:21.950

The stories offer valuable lessons and guidance for others who are working to get their research disseminated or used. So, we encourage you, if you are interested, to reach out to us at the email address you see on your screen itr-dot-researchfeedback-at-usaid-dot-gov.

If you have an example from using this toolkit, and we may reach back out to you to share your story in a USAID blog post. We would certainly ask your permission before doing so. So please do continue to share, okay, your success stories or your questions, or your recommendations for how we can even improve the toolkit. We're always open to that as well.

00:55:31.000 --> 00:56:26.980

Julie MacCartee: Great. As mentioned at the start of today's webinar, this is the second webinar in a 4 part series, and the next two webinars will go into greater depth on the other two sections of the toolkit.

On March 2, we'll be discussing the Communication Products section and on March 9 we'll be looking at the Research-to-Action Plan Section. We hope you'll be able to join us. For both of those, invitations will be sent out to everyone who joined today's webinar. But you can also register on our event website or forward the links or emails to your colleagues who may be interested on the event website. You'll also be able to access a recording of today's webinar, which you can re-watch or share with others.

And we will add a link one more time to the website in the chat, and for good measure we'll also add a link in the chat box to the Research Translation Toolkit itself one last time.

00:56:38.220 --> 00:57:28.230

Julie MacCartee: All right. On that note, I do see that there is one final question in the chat which I don't want to overlook, from Sally, who says, “what are your recommendations for doing this virtually? I have used these tools over three separate meetings and have made incremental progress towards developing a plan.”

That's a really great question, and obviously something we've grappled with, especially over the past 3 years. The virtual engagement with stakeholders has its pros and its cons. From the RTAC team, are there any insights you'd like to share about kind of those opportunities or challenges of either interviewing stakeholders in a virtual manner or for doing this process virtually?

00:57:29.780 --> 00:58:32.440

Marlene Lee: Julie, this is Marlene Lee. I have worked with the RTAC team on research-to-action planning and have done my own research. I have been remarkably impressed by the success that some of our teams have had with virtual engagement of stakeholders during this period, when stakeholders were not in their offices, and some of that can be attributed to actually having more time on their hands without having a lot of meetings. But I think it also created a change where people are more willing to do virtual engagement than prior to our COVID-19 experiences.

00:58:32.850 --> 00:59:25.770

Marlene Lee: One important piece of doing this virtually is to do your background research so that you're not just reaching out randomly, that you have a reason to believe that a particular office or person would be interested in your work. And then I also think it's important to capitalize on people within your own networks, so that you use a contact that you have that might be able to help you speak to somebody within the Ministry of Health, who might not be exactly the right person, but because of your contacts we'll spend the time to help you figure out the right office and the right person. I hope that was helpful.

00:59:28.010 --> 01:00:20.250

Julie MacCartee: Yes, thank you, Marlene. Great points about doing that research ahead of time that a lot of stakeholders, especially in Government ministries, probably have a lot of people coming at them. And so a request, just can we talk, may not be enough, but having some foundational reasoning or proposal, or a personal connection in your outreach can be very effective.

And yes, the virtual outreach, again has its pros and cons. In-person is ideal in many ways, but virtual allows us to reach potentially a much broader range of stakeholders in a shorter period of time.

01:00:25.160 --> 01:01:06.240

Julie MacCartee: Great! Well, thank you all so much for your questions, your engagement today, and your commitment to translating research into actionable recommendations and engaging with stakeholders. We hope that this webinar was helpful to you, and we'd love to see that future webinars. We'd also love your feedback at anytime in the chat box or, again, at itr-dot-researchfeedback-at-usaid-dot-gov. On that note, we would be happy to wrap up today and wish you all a good rest of your Thursday. And we hope to see you next week. Thank you all very much.