**Reflections on Engaging End Users:**

**Key considerations for engaging end users throughout the course of a collaborative project**

While researchers produce a great deal of knowledge that is potentially useful to decision makers, much of it is not actually used by decision makers. Oftentimes, approaches such as “educating the user or decision maker” are insufficient, too late in the game, or not entirely the right approach. While each project is unique and there is no “one size fits all” method to engaging end users, there are some common important considerations when working towards achieving usable results. For example, increasing attention has been placed on opportunities for both interaction between researchers and end users, and efforts to tailor and customize information for a particular end user.

This tool is designed to help project teams develop a responsive and adaptive process for engaging end users in order to achieve desired outcomes. This tool is meant to be used at the discretion of a project team to support end user engagement at various stages of a project, and in whatever format best meets a team’s needs. These questions and suggestions are by no means exhaustive. Some may be more relevant than others, depending on your relationship with your end users and the extent to which you understand each other’s needs and perspectives. The questions are organized based on project phase but you may find value in considering some questions in advance and throughout your project.

This tool includes the following sets of questions:

* Questions for the project team at the proposal development stage
* Questions for end user(s) during proposal development and to revisit at project outset
* Questions for end user(s) on an ongoing basis, e.g., after each team meeting
* Questions for end user(s) at project completion

**Questions for the project team at the proposal development stage**

Once your project team and end users identify a shared interest or need and decide on a project idea, the team and primary end users must agree on several elements before the project can progress.

1. What decisions or actions do we seek to inform?
2. What is the specific management or decision making context for the project? Describe the opportunities and constraints to be taken into account as you seek to address both end user needs and the identified research question.
3. What outcomes do we seek to achieve? Project outcomes are the consequences of the application of the output(s) associated with the project. Examples:

* New or refined decision-making and/or management processes and a plan for future iterative evaluations of these processes;
* Stronger collaborative relationship among reserve staff, partners, and end users; and/or
* Better understanding among researchers and end users of how their respective fields can inform each other’s efforts.

1. What outputs do we seek to produce in order to achieve the above outcomes? Project outputs are specific products that are informed by, and responsive to, end user needs, and are final by project completion. Examples:

* Scientifically produced analyses of data and information;
* A synthesis of findings;
* Specific product(s) that translate and/or apply the research findings in a way that addresses the identified end user(s)’ needs, e.g., decision support tools, implementation guides, management recommendations, training curricula, and technical or non-technical reports; and/or
* Evaluation of existing decision making information needs.

1. What level of end user involvement is necessary or appropriate for this project to have the desired impact?

Although your project may have a unique need, common levels of involvement include:

* Advisory role – the end user provides feedback on design/implementation at specific stages
* Active advisory role – the end user helps to co-design the objectives and methods for the project, but does not necessarily contribute to project implementation
* Full-time collaborator – the end user helps to co-design and co-implement the project and interpret results
* Co-producing – the end user is co-leading the project

1. What dissemination approaches are most appropriate for the outputs of this project? This should include those appropriate for the primary end user(s) but may include other avenues for sharing the project outputs and findings. Examples:

* Developing appropriate outreach/dissemination strategies with end users
* Conducting outreach to communities of practice (e.g. workshops, symposia, field trips, professional literature)
* Sharing among academic communities (articles, academic conferences, etc.)
* Providing open access (e.g. put information on website for anyone to find)

**Questions for end user(s) during proposal development and to revisit at project outset**

These are the types of questions to ask your end user(s), whether you think you know the answers to them or not, to confirm that everyone is on the same page about the engagement process and project expectations.

1. How would you like to be engaged and at what frequency?
2. What aspects of the project are of greatest interest to you?
3. At what points in the project do you see your perspective as being the most valuable?
4. How do you see this project helping you do your job better?
5. What kinds or types of outputs would be most useful to you?
6. What do you see as the greatest challenge(s) to producing these output(s)?
7. What do you see as the greatest challenge(s) to using these outputs to make decisions?
8. What else would you like to share about your decision making context that would be helpful for the team to know?
9. What didn’t we ask that would be helpful to know in making the project outputs most useful to you?
10. Is there anything that you would change or like to see done differently to improve the relevance of the project outputs to your work?
11. What other questions do you have?

**Questions for end user(s) on an ongoing basis, e.g., after each team meeting**

This set of questions in particular is meant to help you confirm that your end user(s) feels that their input is being received and that the project is being adapted accordingly. Posing these questions to your end user(s) on a schedule that makes sense for the project helps you understand the effectiveness with which you are engaging your end user(s), allows for the identification of opportunities for improvement, and can strengthen your relationship with your end user(s).

1. Did you feel like you were able to provide input to the discussion? If not, what could have been done differently to ensure your input was received and valued?
2. Do you have suggestions about how these meetings could be more helpful to you? Please suggest anything such as changes to format, logistics, content, style, etc.
3. As the project outputs evolve and begin to take shape, do the project outputs in their current planned form align with your management/decision making needs? If not, what changes would be helpful?
4. Has anything about your decision making context changed that should inform the project outputs?

**Questions for end user(s) at project completion**

Once the project is complete, there is value in gathering feedback from your end user(s) about their experience to gauge satisfaction with the outputs, learn more about next steps for their application, and potentially identify new partnerships and opportunities. For example:

1. Will you use the project outputs?
   1. If so, how?
   2. If not, why? Is there anything that could have been done differently to ensure that the project outputs were something you would use?
2. Is the knowledge or other outputs resulting from this project ready to be incorporated into your decision making context?
3. Has your participation in this project been valuable to your work? If so, please describe. This may include benefits beyond the project outputs, e.g., relationship building, networking, identification of new partnerships and projects to pursue.
4. Overall, were you satisfied with the quantity and quality of your interaction with the researchers/project team?
5. In the future, what could be done to improve the utility of these kinds of research team-end user interactions?
6. If relevant, do you plan to stay involved in activities associated with this project?