**Supplemental Material S1.** Community Engagement Studio fidelity checklist.

| Community Engagement Studio Fidelity Checklist<br>OHSU/OCTRI Community Outreach, Research & Engagement | |
| --- | --- |
| **Pre-Planning** | |
| Application/request including brief description of project, population of interest, nature of input needed/problem | |
| Confirm CES is right approach for researcher's needs | |
| Identify facilitator based on CES possible demographics or focus | |
| Set planning meeting and share FAQ and PowerPoint template | |
| **Planning meeting with researcher/research team** | |
| PI, community navigator, facilitator attends | |
| Explain CES process | |
| Review CES ground rules for research team | |
| Clarify focus areas of CES (2-3 max) | |
| Define characteristics of expert panel | |
| Coach effective communication with community experts | |
| Provide presentation template and guidelines for completion | |
| Identify at least 3 possible dates for CES (consider an evening option) | |
| **CES Team** | |
| Identify neutral facilitator (community member recommended) | |
| Confirm community navigator/manager availability | |
| Identify support staff to help with recruitment, logistics | |
| Develop facilitators guide (2-3 main questions plus prompters) | |
| Vet researcher presentation | |
| Researcher and facilitator review final slides and facilitator's guide | |
| Create Community Expert Screener (typically through REDCap) | |
| Recruit and screen community members for expert panel | |
| Create shared spreadsheet to track and coordinate community recruitment contacts | |

| **Community Experts** | |
|---|---|
| Ensure no relationship with researcher/research team (e.g., patients, research participants) and representative of population of interest or provider to population | |
| Provide orientation if new to CES and explain compensation | |
| Provide study materials to community experts for review in advance if needed | |
| Review compensation expectations (e.g., length of time to receive compensation, type of gift card, if social security numbers required) | |
| **Logistics** | |
| Poll experts for optimal date and location | |
| Secure meeting room at location with convenient parking and/or transit options | |
| Ensure access to computer, projector and power cords | |
| Ensure digital access to presentation (thumb drive, internet) | |
| Order food - accommodate dietary restrictions/needs. Researchers eat alongside Studio experts | |
| Print forms - sign in sheet, paperwork for expert payment, evaluation surveys, expert comment form | |
| If needed, print research materials for review (flyers, brochures, surveys) | |
| Gather supplies (markers, pens, flip charts, name tents) | |
| Gift cards for payment if used | |
| Confirm time and location with researcher and experts, including any relevant instructions to the Studio (e.g., parking, how to find room, contact if lost) | |
| **Studio** | |
| CES team present | |
| No more than 2 members of research team in attendance | |
| 8-10 member expert panel | |
| Welcome, introductions | |
| Review process and ground rules<br>    a.   First names, everyone sit at table, no wrong answers, different opinions are encouraged, everyone on panel participates, do not talk over others<br>    b.   Housekeeping location of bathrooms, turn off cell phones | |
| 10-minute presentation by PI, followed by very brief Q & A for clarification | |
| Facilitator uses facilitation guide to direct conversation | |
| Facilitation techniques used to balance power, include all voices, empower experts, validate experts' comments, stay on focus | |

| | |
|---|---|
| Navigator takes notes on flip charts, visible to all | |
| Facilitator reviews expert responses, recommendations for affirmation, validation | |
| Experts complete written comments form | |
| Experts complete application to be included in database for future CES | |
| Evaluations completed by researcher and experts | |
| Handout gift cards or complete paperwork for expert compensation | |
| **Follow Up** | |
| Send "Thank you" to experts | |
| Make sure payment is sent to experts in timely manner if gift cards are not used | |
| Type up summary for researcher (expert comments plus specific recommendations) | |
| Contact researcher if additional info or assistance with recommendations are needed | |
| Report back to experts on actions/changes mad as a result of their input (may take 3-6 months or more, depending on project) | |
| **Facilitation** | |
| Use opener to engage each expert at the beginning by going around the room - "What are your initial thoughts about the project?" | |
| Call each person by their name to establish rapport as opposed to general use of "you" | |
| Don't ask yes or no questions | |
| Ask experts to elaborate on short answers. Avoid interjecting personal experience and opinions | |
| Use body positioning to redirect conversation or address dominate experts | |
| Limit researcher/staff commentary | |
| Refocus experts as needed by restating/rewording question | |
| Create "parking lot" for issues that are not specific to discussion | |
| Give time reminders to move along discussion as needed | |
| Be comfortable with silence to give experts time to think and respond | |
| **Follow Up** | |
| Send "Thank you" to experts | |
| Make sure payment is sent to experts in timely manner if gift cards are not used | |
| Type up summary for researcher (expert comments plus specific recommendations) | |
| Contact researcher if additional info or assistance with recommendations are needed | |

| | |
|---|---|
| Report back to experts on actions/changes mad as a result of their input (may take 3-6 months or more, depending on project) | |
| **Recordkeeping** | |
| Enter new community experts in expert data base | |
| Enter evaluation surveys in database | |
| Update CES Record database | |