

Patient Engagement Principles Checklist

Principle	Actions	Timing
Principle 1: IVI will involve multiple stakeholders in value assessment.	<input type="checkbox"/> Consult with Board of Directors (BOD), Patient Advisory Council (PAC), and Scientific Advisory Panel (SAP) on key projects to identify desired stakeholder involvement. <input type="checkbox"/> Outreach to organizations identified as thought leaders in value. <input type="checkbox"/> Communicate IVI Principles and expectations of patient engagement with potential and current partner organizations.	Ongoing
Principle 2: IVI will employ robust methods to identify and involve patient stakeholders.	<input type="checkbox"/> Document principles and specific patient roles in IVI work and define expectations and supports as part of outreach and engagement of patient partner organizations. <input type="checkbox"/> Consult with BOD, PAC, SAP, prior patient partners, external patient-focused organizations and individuals, and staff to identify key informant organizations and individuals related to questions of interest. <input type="checkbox"/> Use public announcement and social media to seek individual and group engagement.	Project Planning
Principle 3: IVI will partner with patient stakeholders at all stages of research.	<input type="checkbox"/> Create and implement plans for engagement of defined patient stakeholders in all stages of IVI project; priority setting, defining research questions, study protocol design, conducting study, analyzing results, and dissemination. <input type="checkbox"/> All participants disclose their conflicts of interest and receive appropriate and commiserate remuneration of their participation. <input type="checkbox"/> Include in all projects defined timelines and steps for ensuring patient stakeholder engagement and feedback components, with adequate review and participation periods. <input type="checkbox"/> Project coordinators will work with patient participants to ensure that research findings are communicated in a way that is accessible to patients (e.g. free of jargon). <input type="checkbox"/> Project methods section explains how patients were involved in the project, and patients are given appropriate recognition in credits or authorship.	Project Inception
Principle 4: IVI will continuously evaluate and refine patient partnership action.	<input type="checkbox"/> Informal feedback sought from patient partner groups and external patient organizations about process. <input type="checkbox"/> Post project evaluation distributed to patient partners for feedback. <input type="checkbox"/> Evaluation results shared internally for process improvement. <input type="checkbox"/> Annual patient engagement evaluation conducted to assess progress, improvement opportunities and fidelity to patient engagement rubric (e.g., National Health Council).	Periodic; Annual
Principle 5: IVI will commit resources for continuous patient engagement.	<input type="checkbox"/> Create dedicated roles and staff time commitment to patient engagement processes. <input type="checkbox"/> Project budgets and staffing reflect responsibility and time dedicated to patient engagement.	Ongoing