



Area	Description	Strategy	Strategy Details
Relationships	Building relationships on trust, honesty, respect, transparency, and reciprocity can allow for fuller and more meaningful partnership	☐ Discussed what mutual respect, safety, and trust should look and feel like in research setting ☐ Scheduled time for informal activities and celebrations ☐ Distributed materials ahead of meetings, including list of research team members and roles ☐ Describe a process for communicating concerns and to whom they should be directed ☐ Do not use formal titles and credentials to address power imbalances	Enter any details here
Capability	Having conversations about training and support helps to tailor the approach according to the individual needs of people with lived experience	☐ Identified training and support needs ☐ Provided training tailored to learning needs ☐ Provided support for physical and emotional needs ☐ Addressed barriers to engagement ☐ Provided opportunities for mentorship and peer-to-peer support	Enter any details here
Roles and Responsibilities	Being transparent about the expectations can help prevent misinterpretation and improve the collaboration experience	☐ Reviewed goals of the partnership ☐ Reviewed time commitment and expectations ☐ Discussed activities to engage in during the project ☐ Reviewed how project contributions will be acknowledged ☐ Reviewed how the partnership will end ☐ Co-create the role and terms of reference outlining responsibilities	Enter any details here

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Communication	Communicating clearly and consistently can help all members of the team to work better together	☐ Assigned staff to communicate with people with lived experience ☐ Shared information about your organization ☐ Shared information about the project ☐ Discussed preferred methods for contact and communication ☐ Keep people with lived experience in the loop and share how the inputs of people with lived experience have contributed to the project	Enter any details here
Financial compensation and recognition	Compensating people with lived experience fairly for their engagement helps to acknowledge their value and contributions and advances equity	☐ Discussed needs and expectations for compensation ☐ Discussed need for expense reimbursements and eligibility ☐ Set up method and timing for compensation ☐ Be transparent about project and organizational factors	Enter any details here
Sustainability	Monitoring, checking in, and evaluating patient engagement can help the team retain partnerships and understand what went well or how the team can improve	☐ Set up times for check-ins and feedback throughout the project ☐ Scheduled time for evaluation ☐ Provided opportunities for debriefing with people with lived experience ☐ Communicate back to people with lived experience what was heard during the evaluation and how recommendations may be implemented	Enter any details here