



# **PCORI Merit Review: Learning from Patients, Scientists, and other Stakeholders**

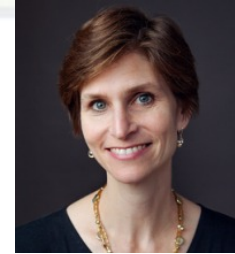
*October 30, 2013*

Patient-Centered Outcomes Research Institute

# Introductions: PCORI Moderators

- Lori Frank, PhD

*Director, Research Integration and Evaluation*



- Laura Forsythe, PhD, MPH

*Program Officer, Research Integration and Evaluation*



- James Hulbert

*Pre-Award Manager, Contracts*



- Suzanne Schrandt, JD

*Deputy Director, Patient Engagement*



# Introductions: Panelists

- Vernal Branch

*Patient Advocate  
Public Policy Advisor, Virginia Breast Cancer  
Foundation*



- Julie Panepinto, MD, MSPH

*Professor of Pediatrics Hematology, Director,  
Center for Clinical Effectiveness Research, Vice  
Chair of Value, Department of Pediatrics, Medical  
College of Wisconsin/Children's Hospital of  
Wisconsin*



- Gregory Sawchyn, MD, MBA

*President, Caduceus Capital, LLC and Senior  
Director, Clinical Guidance Councils for  
OhioHealth*



# Agenda

- Describe PCORI and PCORI's unique Merit Review Process
- Learning from past reviewers: surveys, group interviews, review scores
- Panel Discussion with past reviewers
  - Question and Answer session



## **Background: PCORI and PCORI Merit Review**

Patient-Centered Outcomes Research Institute

# About PCORI

- An independent non-profit research organization authorized by Congress as part of the 2010 Patient Protection and Affordable Care Act (ACA).
- Committed to continuously seeking input from patients and a broad range of stakeholders to guide its work.

# Why PCORI?



- Patients have questions that research can answer
- People want to know which treatment is right for them
- Patients need information they can understand and use



# Our Mission

PCORI helps people make informed healthcare decisions, and improves healthcare delivery and outcomes, by producing and promoting high-integrity, evidence-based information that comes from *research guided by patients, caregivers, and the broader healthcare community.*



Pictured: PCORI Board of Governors (March 2012)



## Our Growing Research Portfolio

Total number of research projects awarded to date:

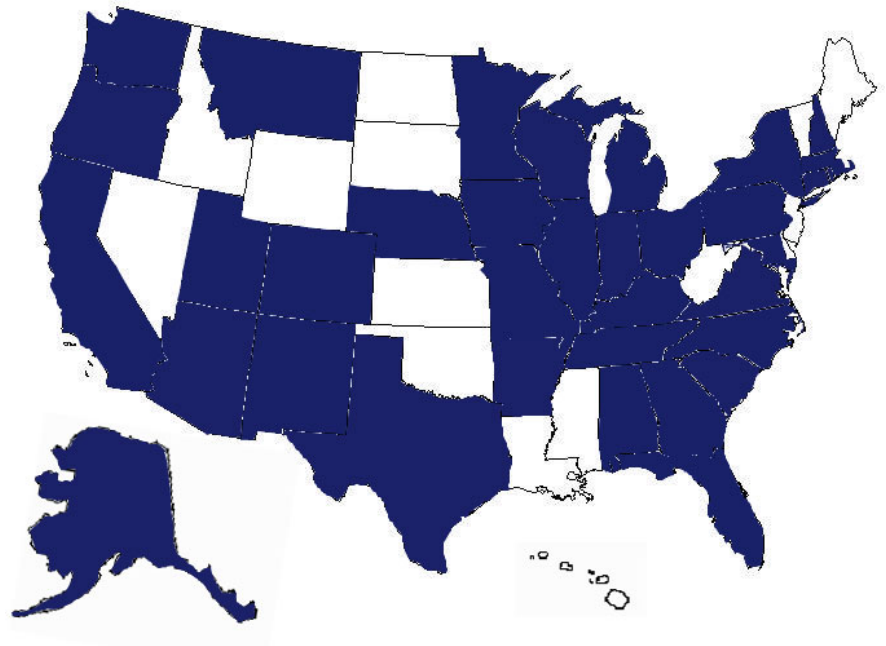
197

Total funds committed to date:

# \$273.5 million

Number of states where we are funding research:

## 36 states (including the District of Columbia)



# Patient Engagement as a Path to Rigorous Research



# Building an Inclusive Merit Review

PCORI created **three categories of reviewers** to bring various perspectives to the review process. The reviewer committee will adhere to a **2:1:1** ratio meaning 2 scientists, 1 patient, and 1 stakeholder will be represented in each group.

**Patients**



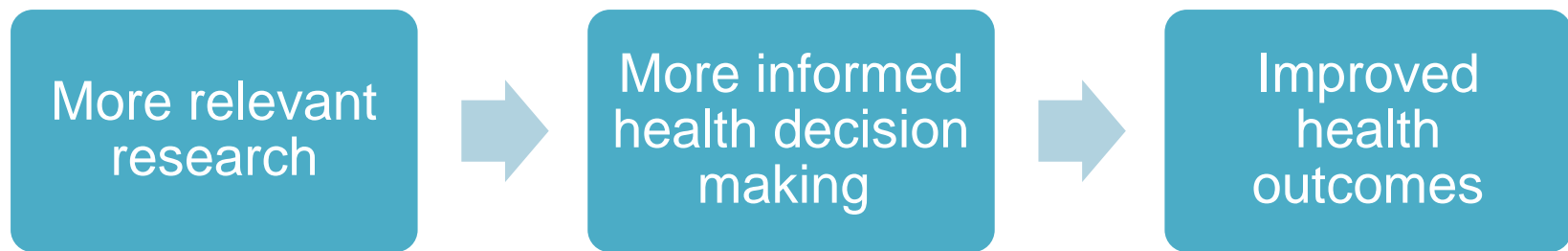
**Stakeholders**



**Scientists**

# Why Be Inclusive in Merit Review?

- Consistent with PCORI's mission for research guided by patients and other stakeholders
- Consistent with the goal of funding research that is relevant to patients and their caregivers



# Application Submission and Merit Review Process Overview



**Apply**



**Preliminary Review**



**In-Person Panel Review**

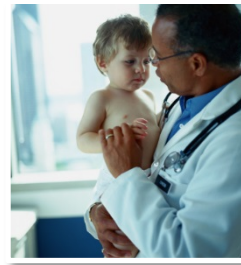


**Final Decision**

# Merit Review Criteria



1. Impact of the condition on the health of individuals and populations



2. Potential for the study to improve healthcare and outcomes



3. Technical Merit



4. Patient-centeredness



5. Patient and stakeholder engagement





## Learning from Past Reviewers

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# Learning from PCORI Reviewers

- Reviewer surveys
  - Closed-ended questions
  - Open-ended questions
- Group interviews with reviewers
  - Discuss survey findings
  - Hear more about concerns and suggestions for improvement
- Review of merit review scores pre- and post-discussion

# Cycle III (April – August 2013)

**440  
applications  
received**

**173 reviewers  
participated**

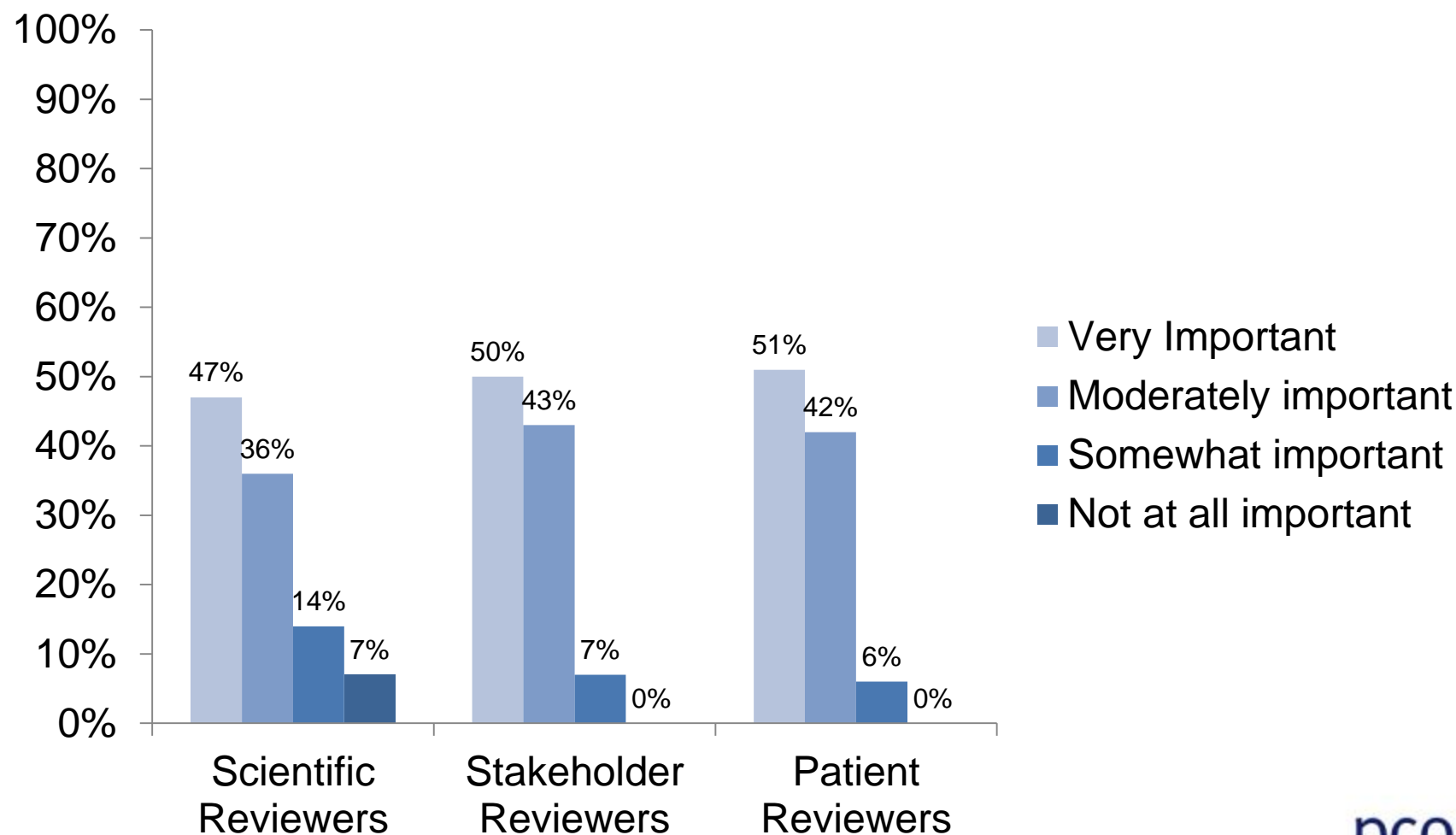
**52 projects  
funded for  
\$96.2 million**



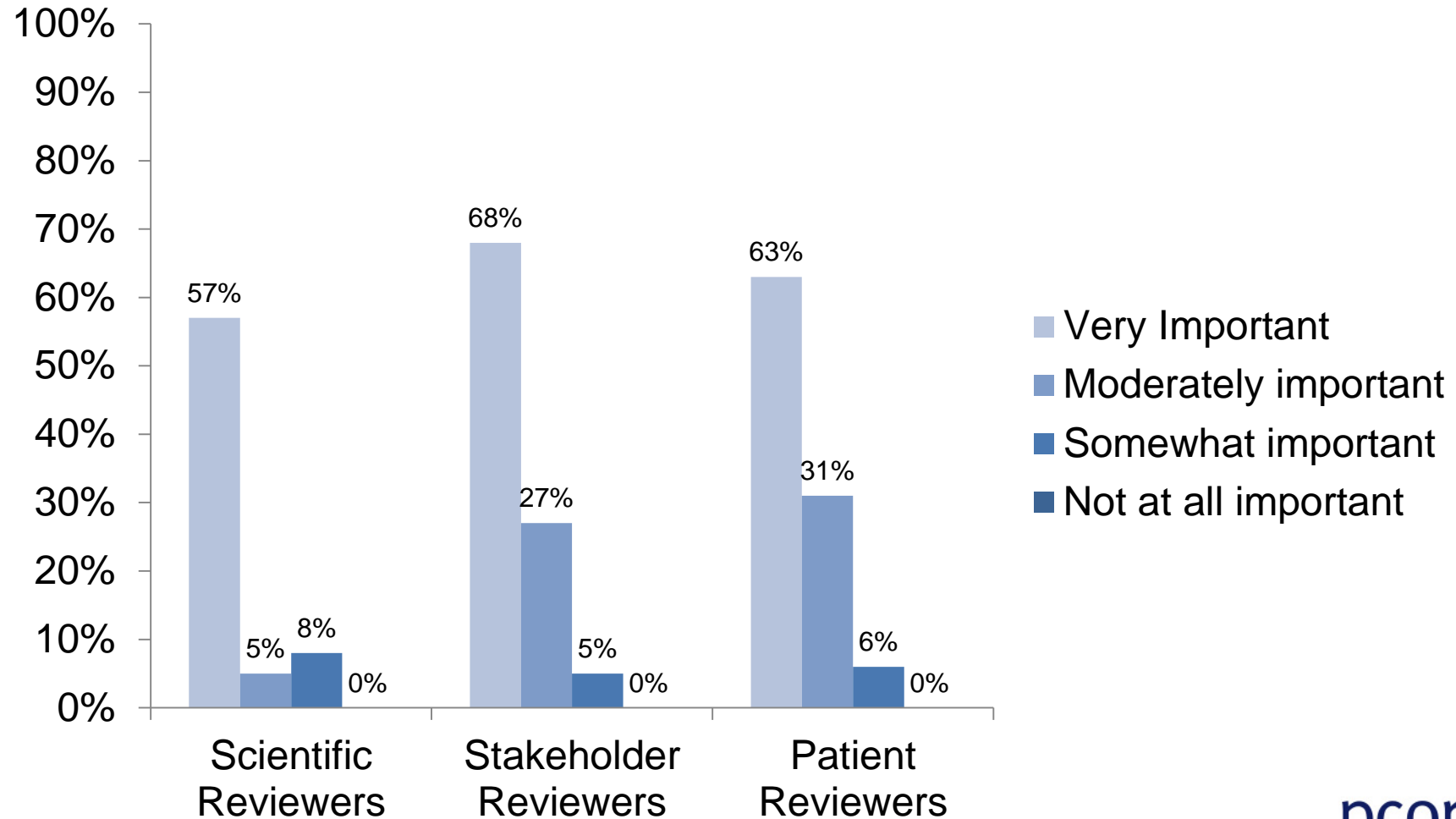
## Use of PCORI Criteria

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# *How important was each of the criteria to your final scores? ... Impact of the condition*

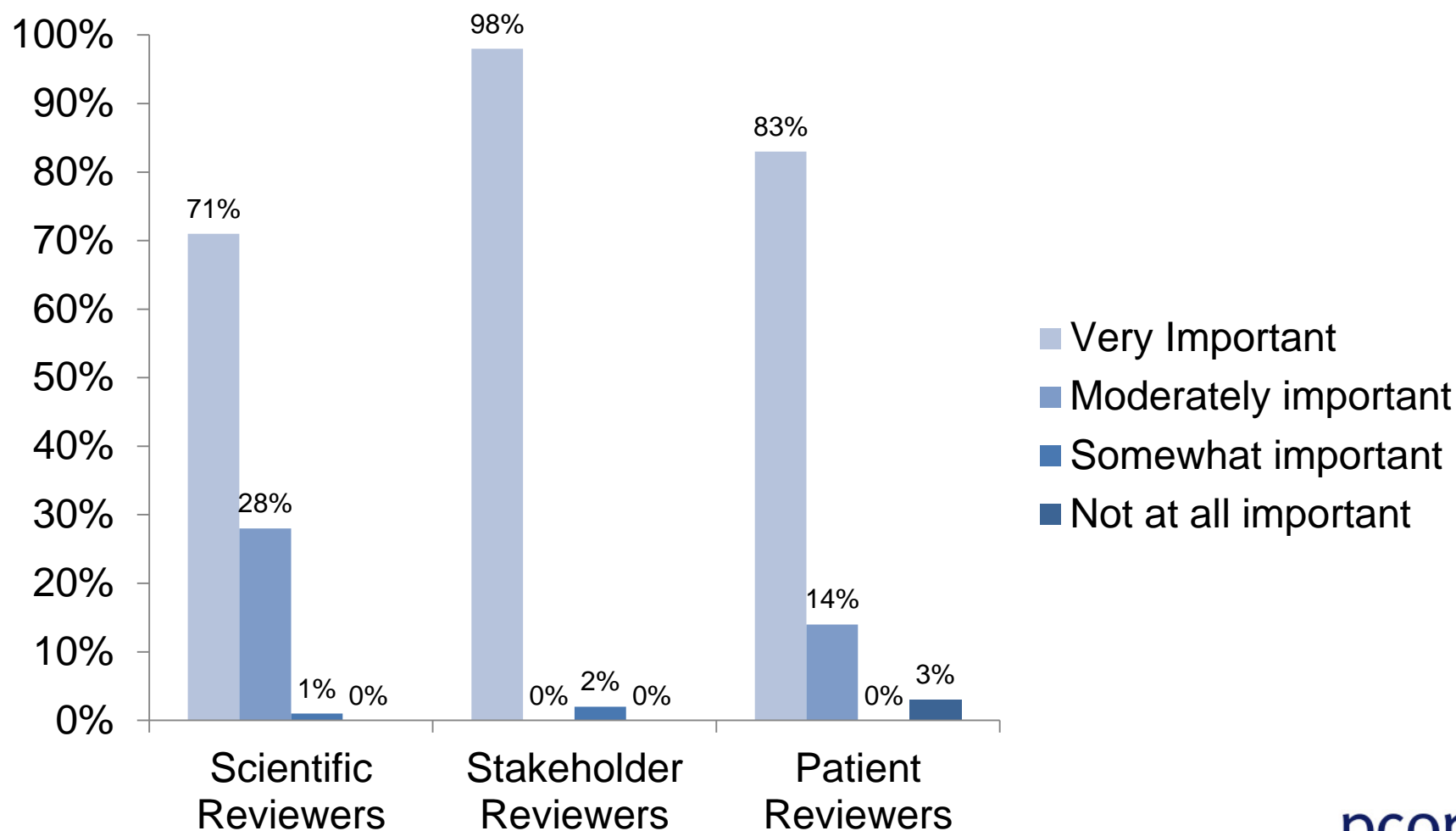


# *How important was each of the criteria to your final scores? ... **Potential for improving care and outcomes***

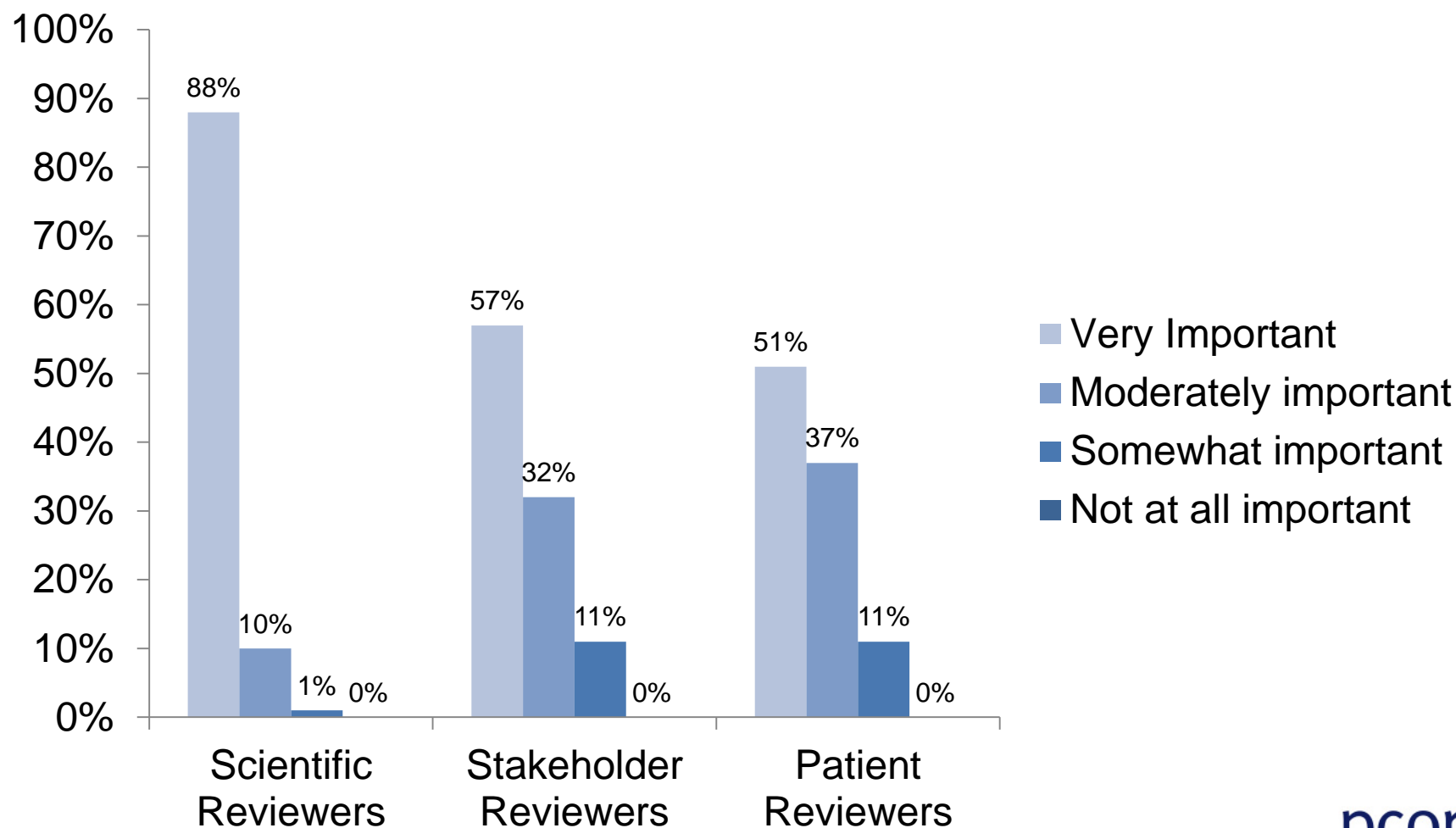




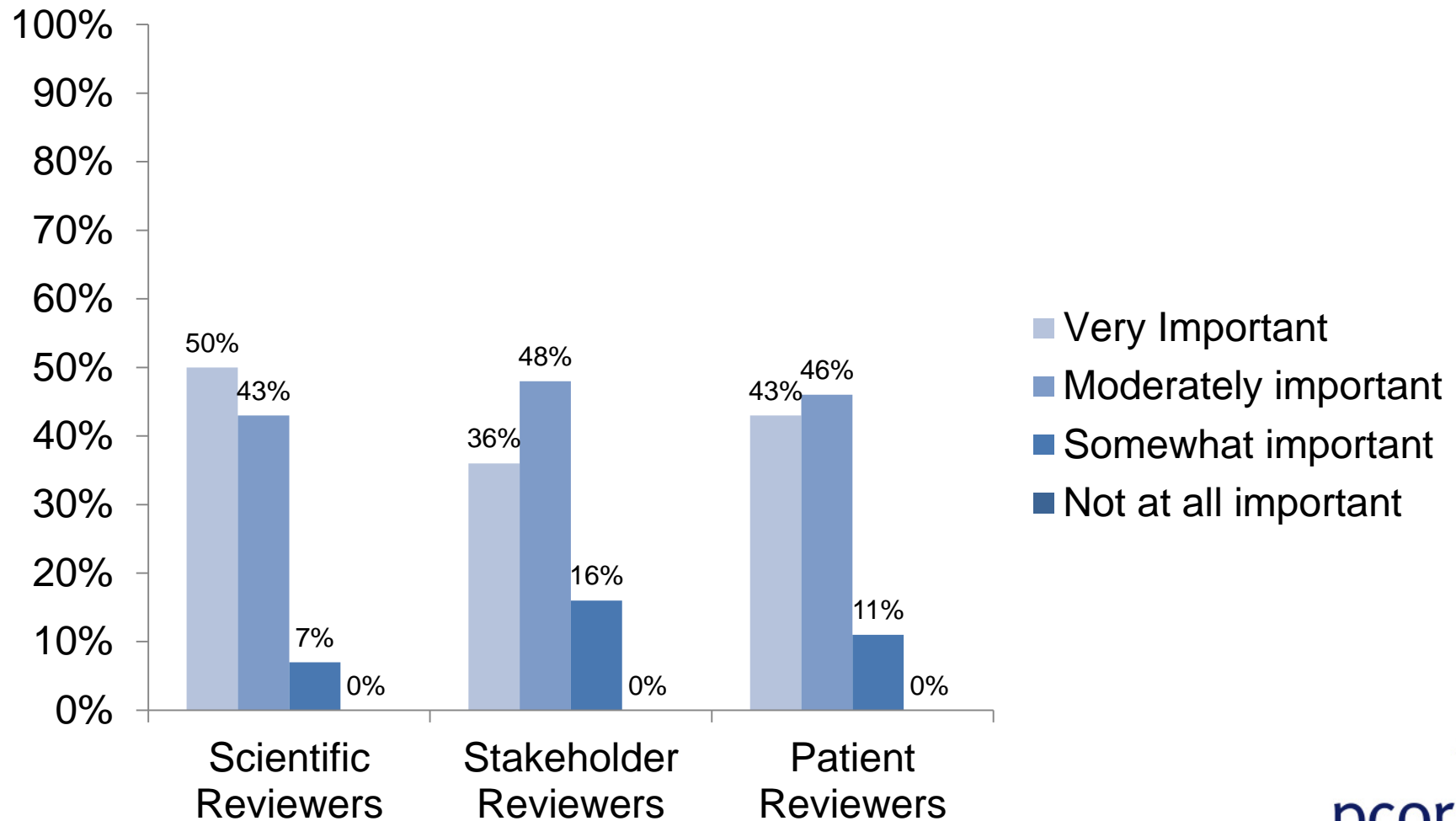
# How important was each of the criteria to your final scores? ... **Patient-centeredness**



# *How important was each of the criteria to your final scores? ... **Rigorous research methods***



# *How important was each of the criteria to your final scores?...**Research team and environment***



# Challenges for PCORI Merit Review: Qualitative Findings

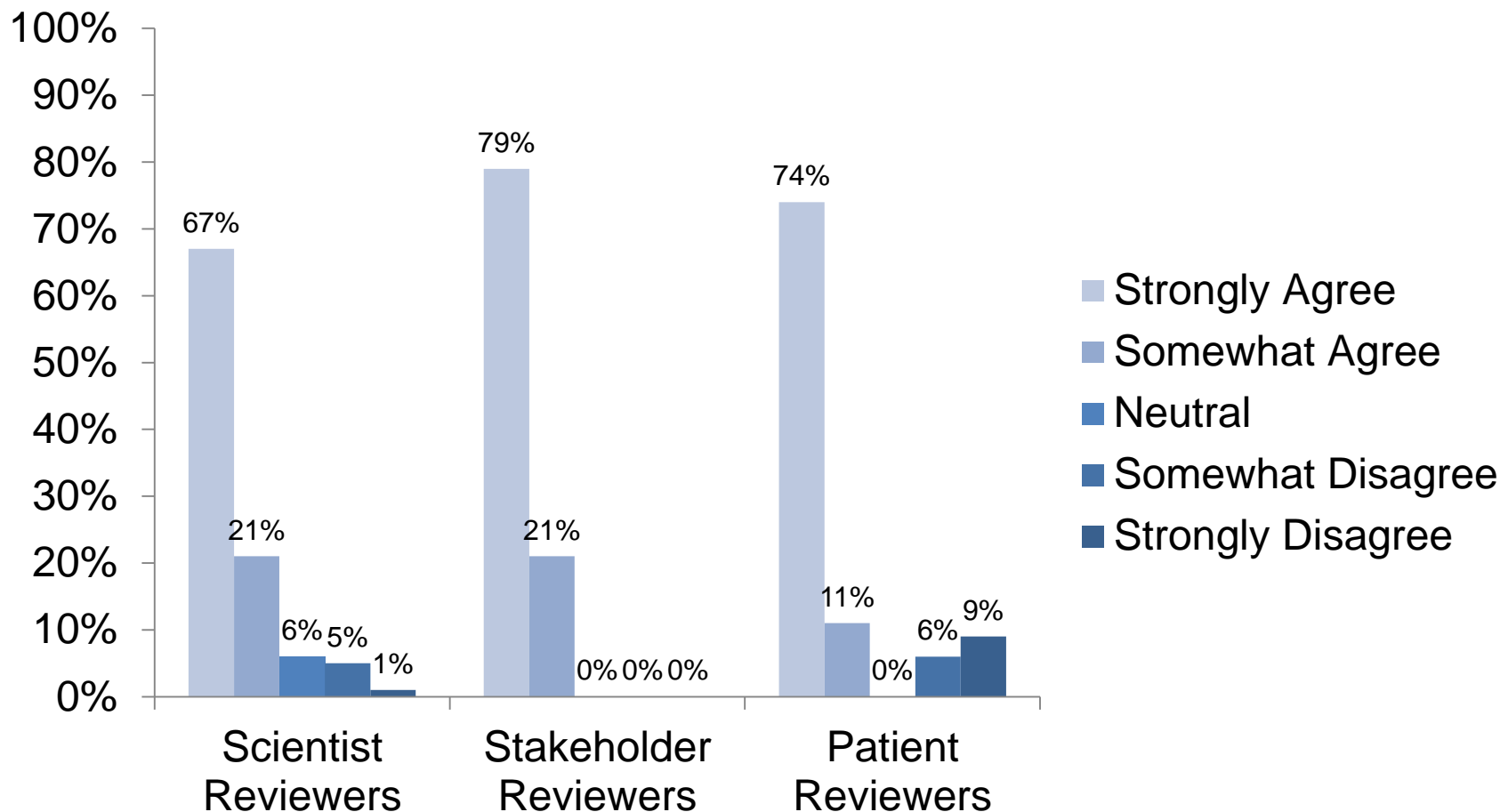
- Need for more guidance about the meaning of criteria and use of a scoring scale
  - *“More emphasis needs to be placed on how to choose a score during the training.”*
- Time burden for review
  - Too many applications to review
  - Written critiques have redundant components



## In-Person Panel

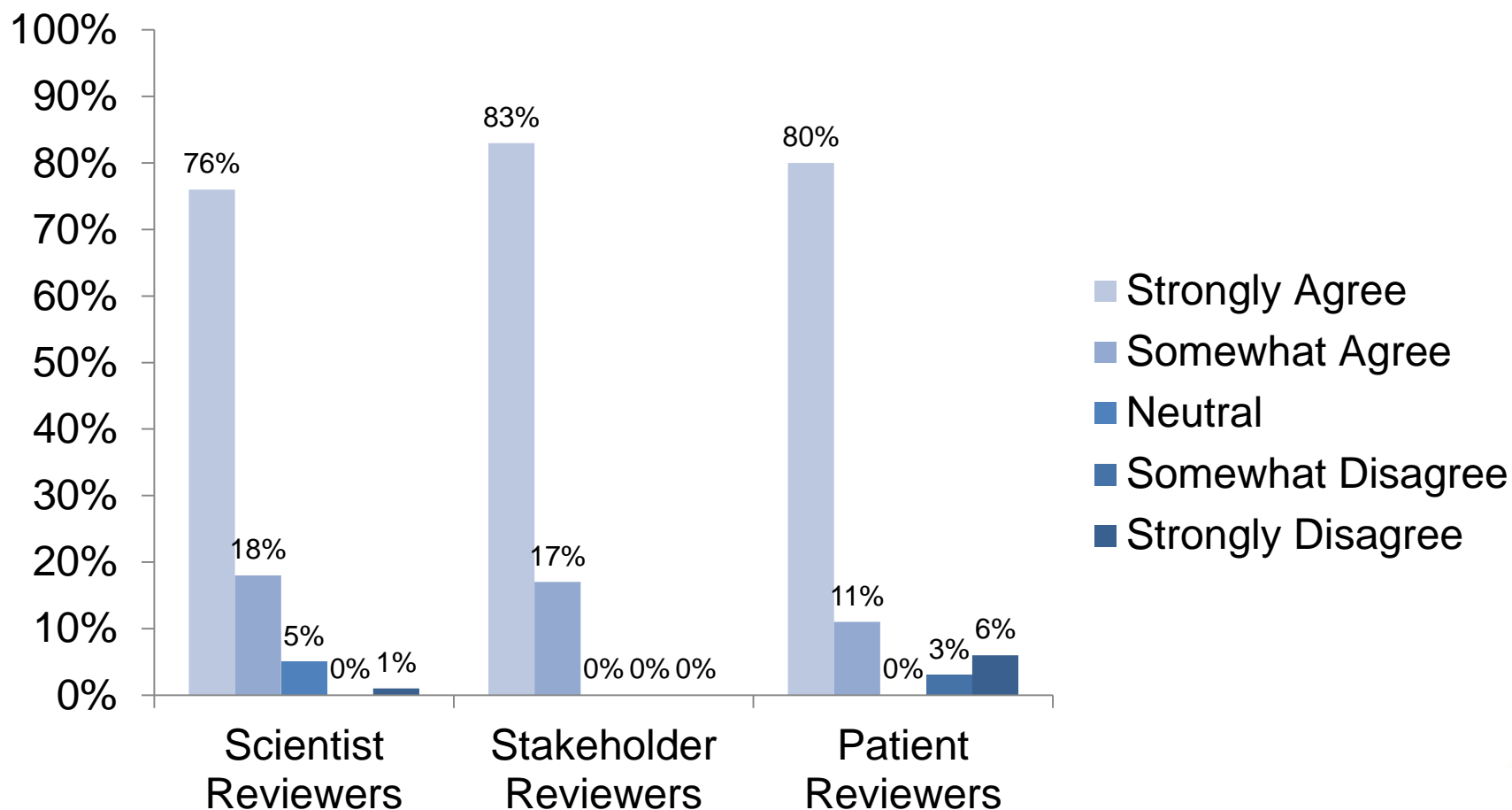
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# *The chair(s) ensured that different points of view were heard*

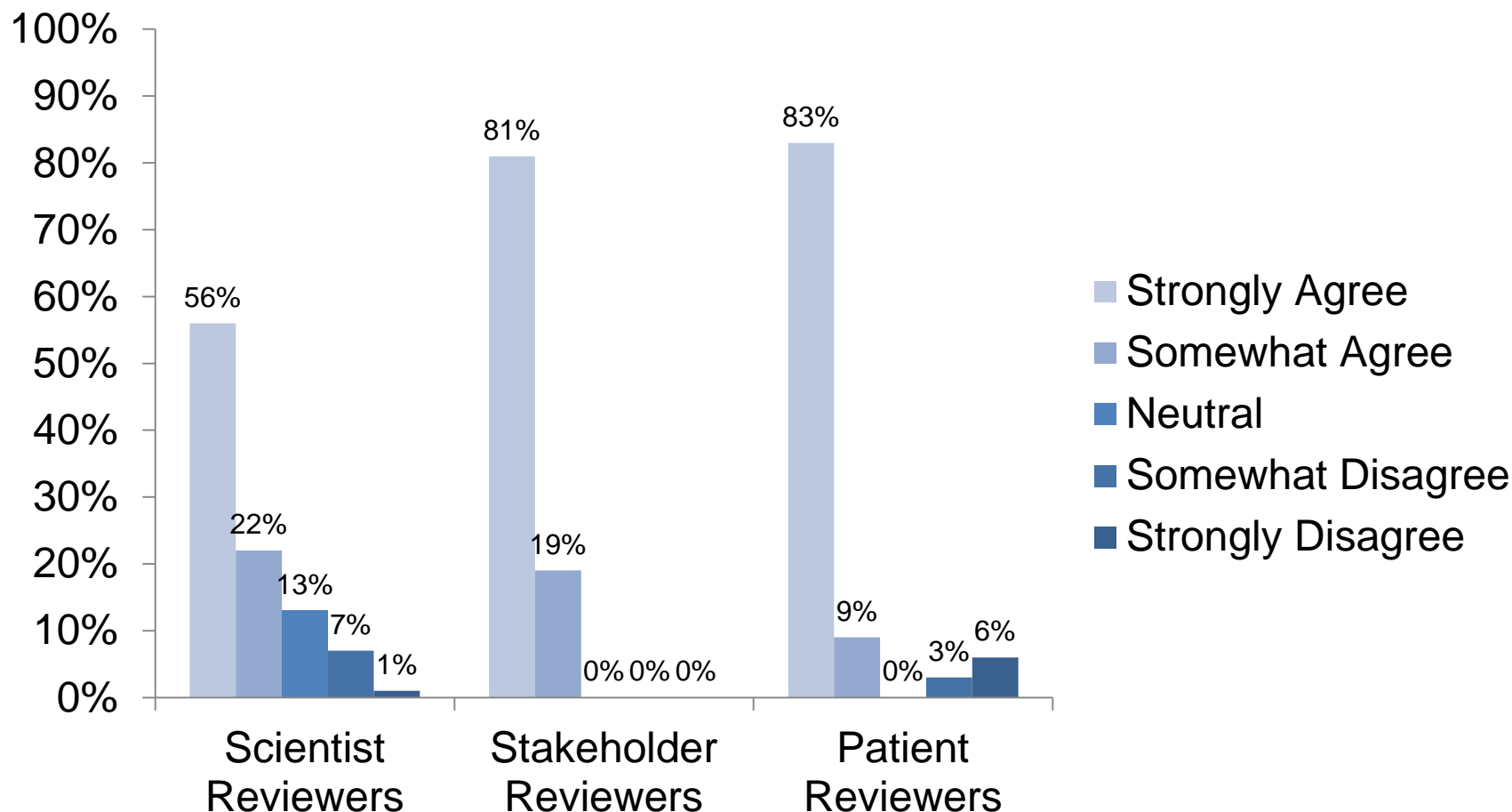




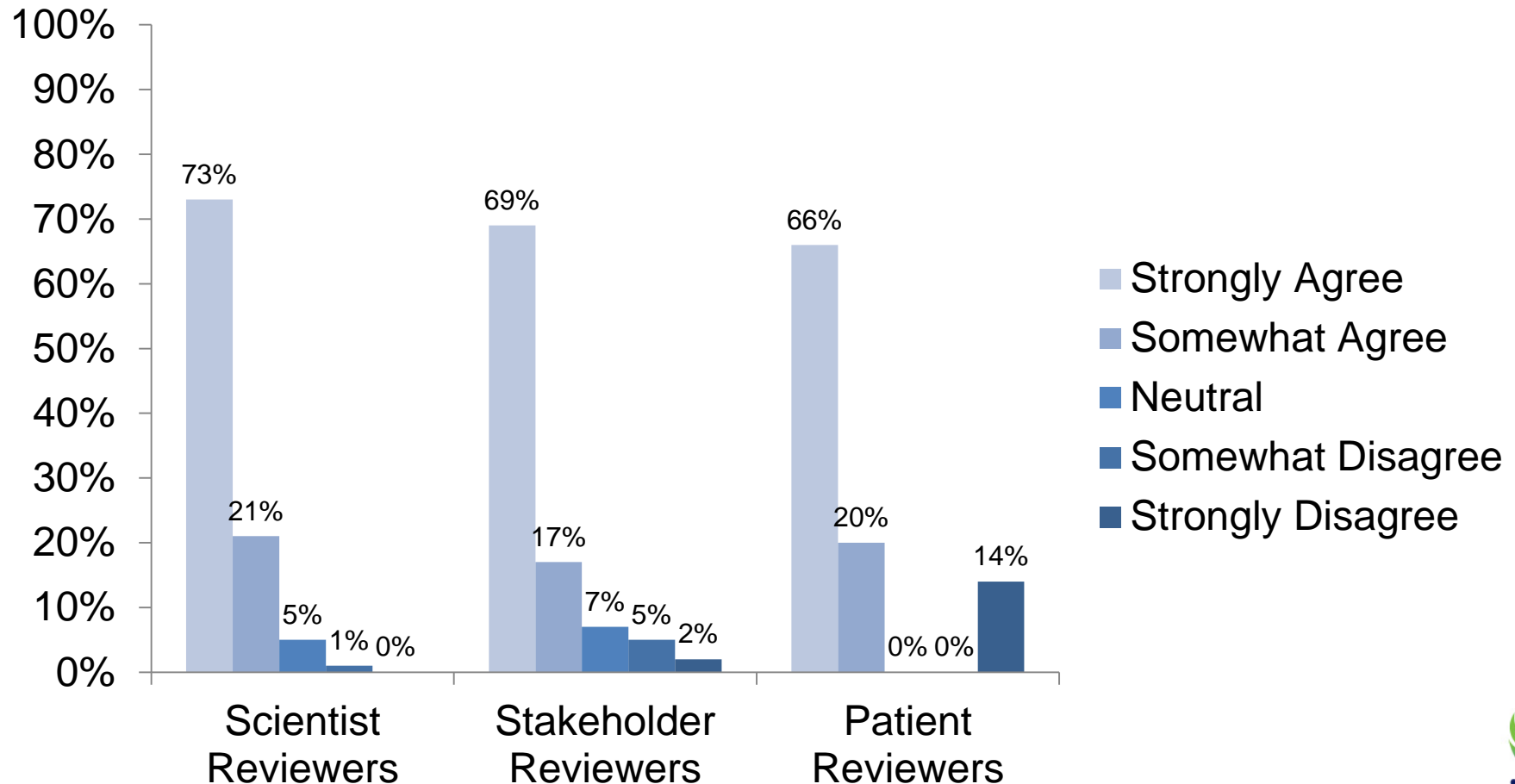
# *The scientific reviewers provided valuable input during the discussion*



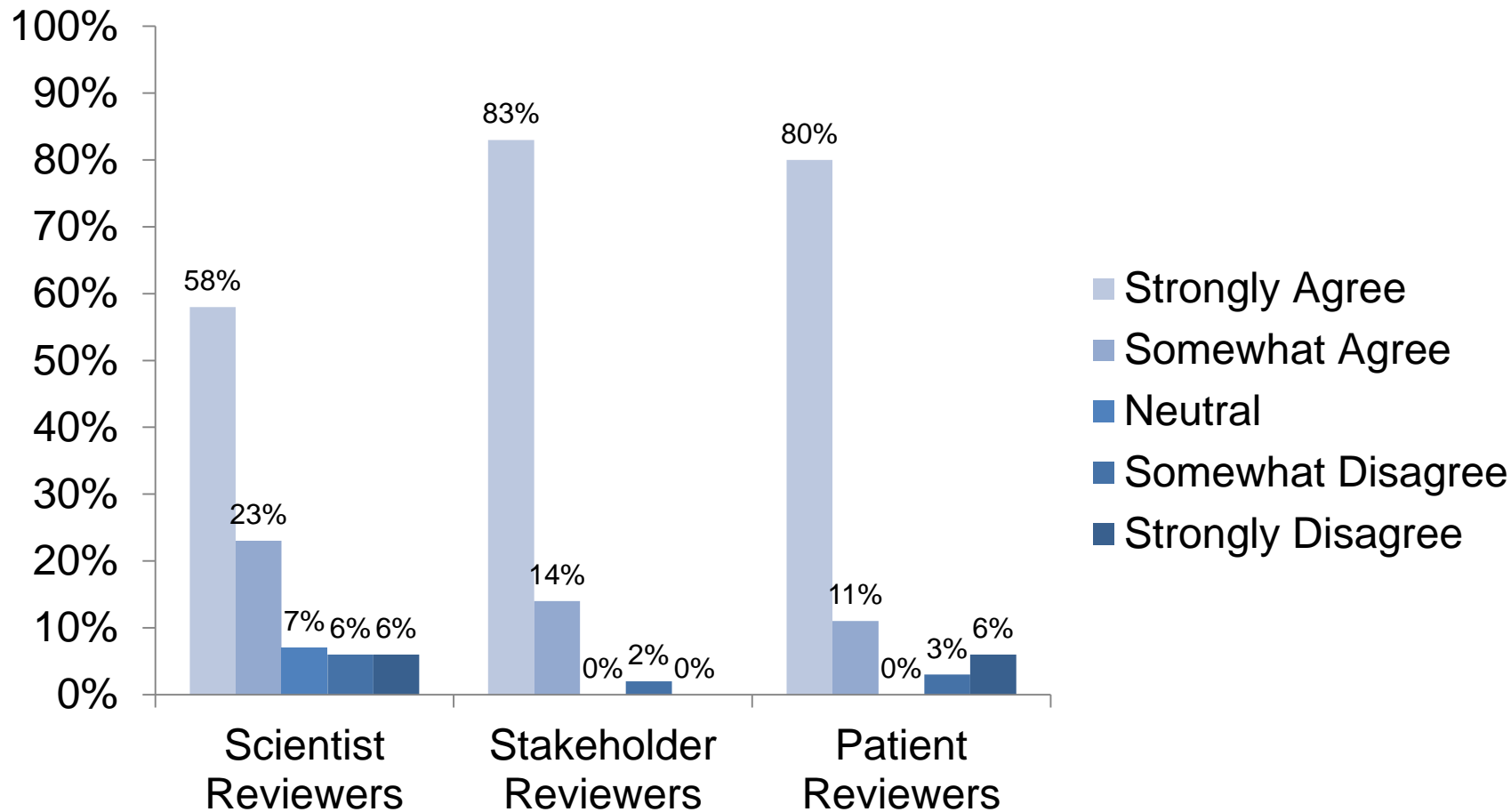
# ***The patient and stakeholder reviewers provided valuable input during the discussion***



# ***Overall, scientific reviewers were receptive to input from patient and stakeholder reviewers***



# ***Overall, patient and stakeholder reviewers were receptive to input from scientific reviewers***



# PCORI In-Person Review: Qualitative Findings

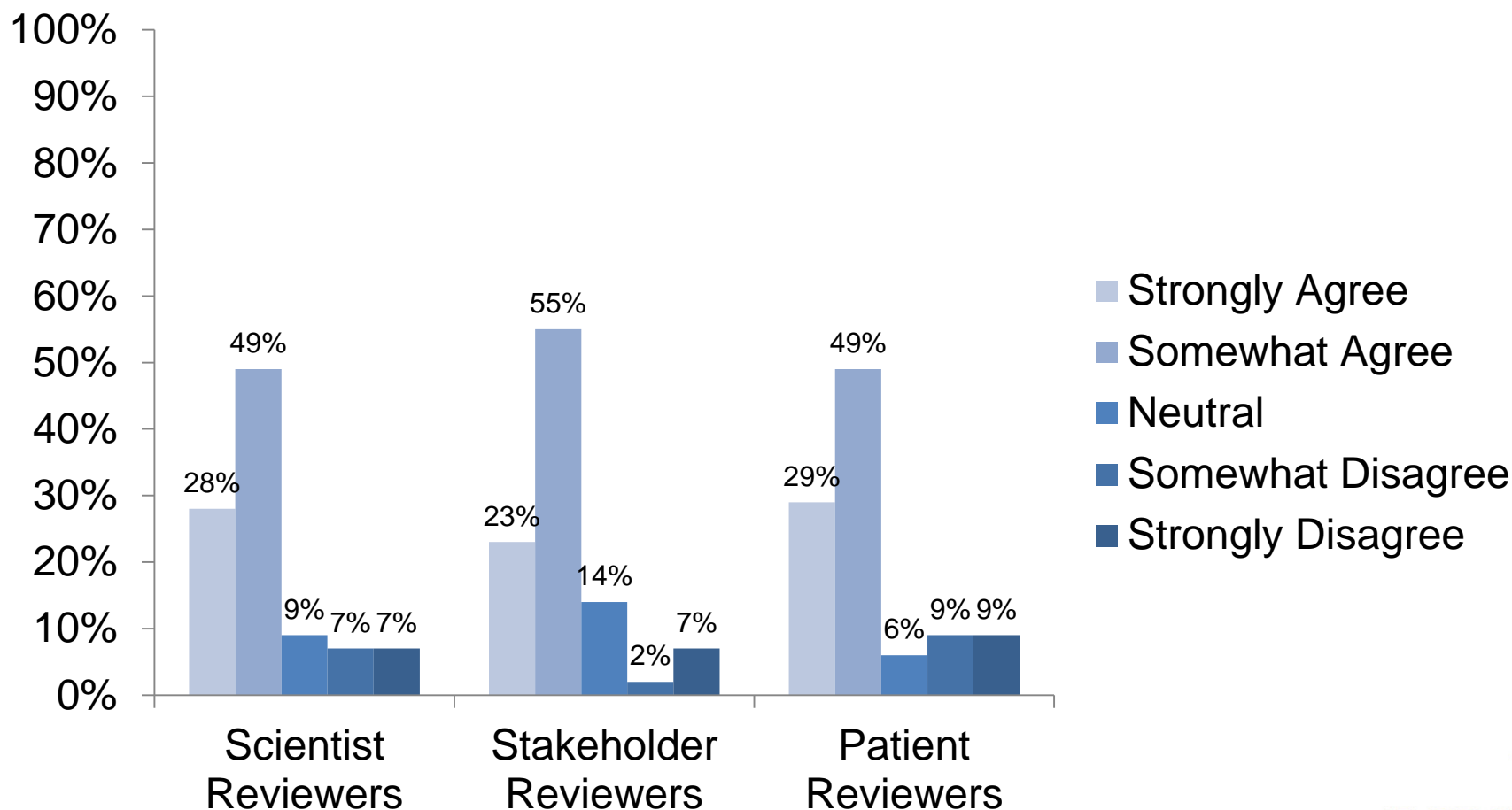
- Mix of reviewers is unique and valued
  - *“It was very rewarding to be part of the process, and I truly believe it resulted in a more substantial and ultimately meritorious consideration of the applications.”*
  - *“As a scientist, I have really learned from the other reviewers, both scientists and patient/stakeholders.”*
- Panels are well moderated by chairs for collegial, collaborative, respectful dialogue
  - *“This was the most positive, collaborative review process that I've participated (in).”*

# Challenges for PCORI In-Person Review: Qualitative Findings

- Continued need to promote equality
  - *“I think there was some amount of—even self-censorship on the part of patients, because they just felt like they didn’t have a right to their opinion, the scientists did.”*
- Differences between scientific reviewers and patient/stakeholder reviewers
  - Perceptions that scientists, patients, and other stakeholders score the same proposals differently
  - Perceptions that criteria are valued differently by scientists, patients, and other stakeholders



# *My final scores were influenced by input from other reviewers*



# Change in Overall Scores: Pre- to Post-Discussion

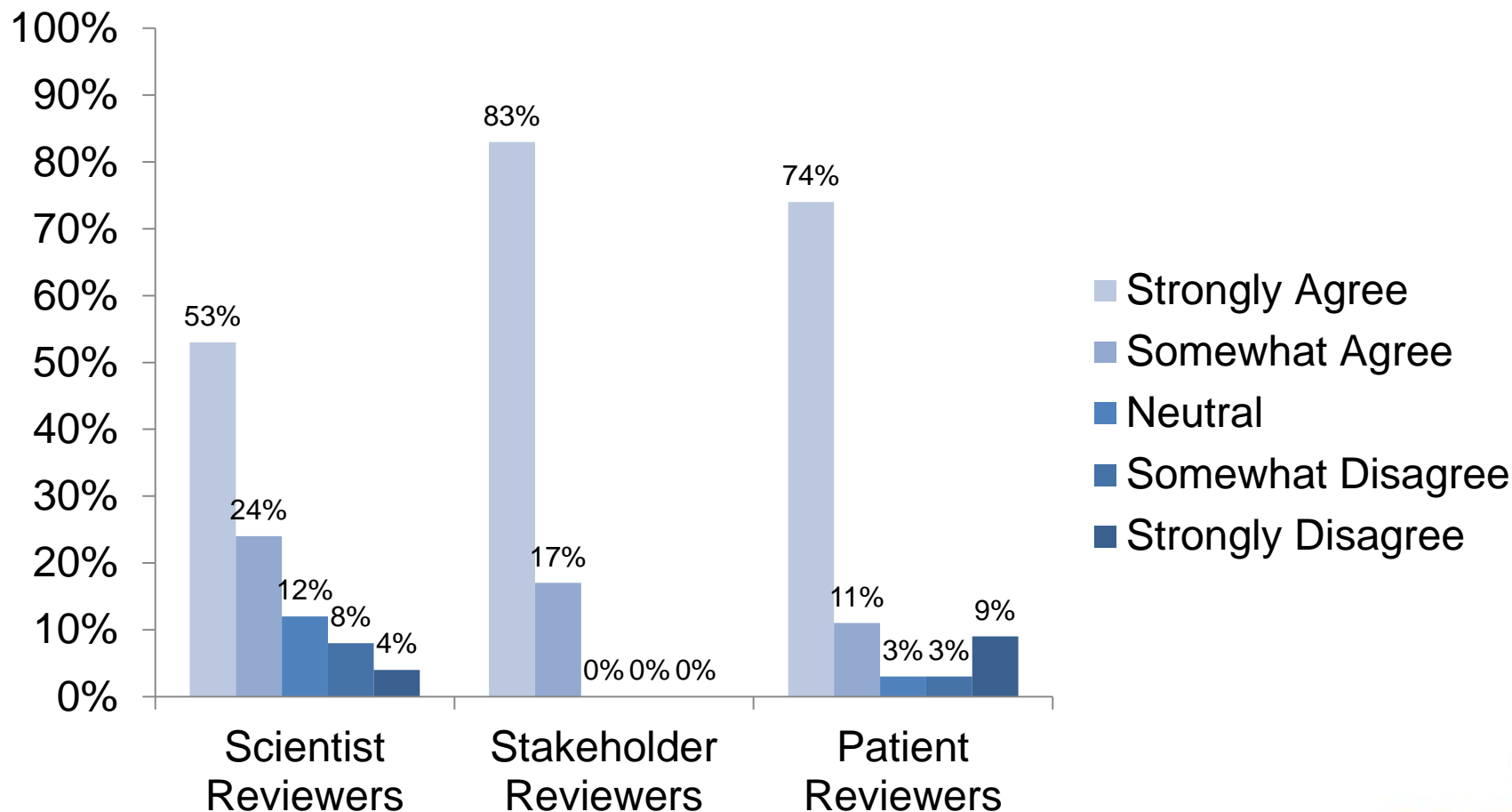
	Total	Scientists	Patients	Stakeholders	p
Change by $\geq 1$ point	51%	48%	50%	57%	0.311
Change by $\geq 2$ points	22%	16%	26%	31%	<b>0.001</b>



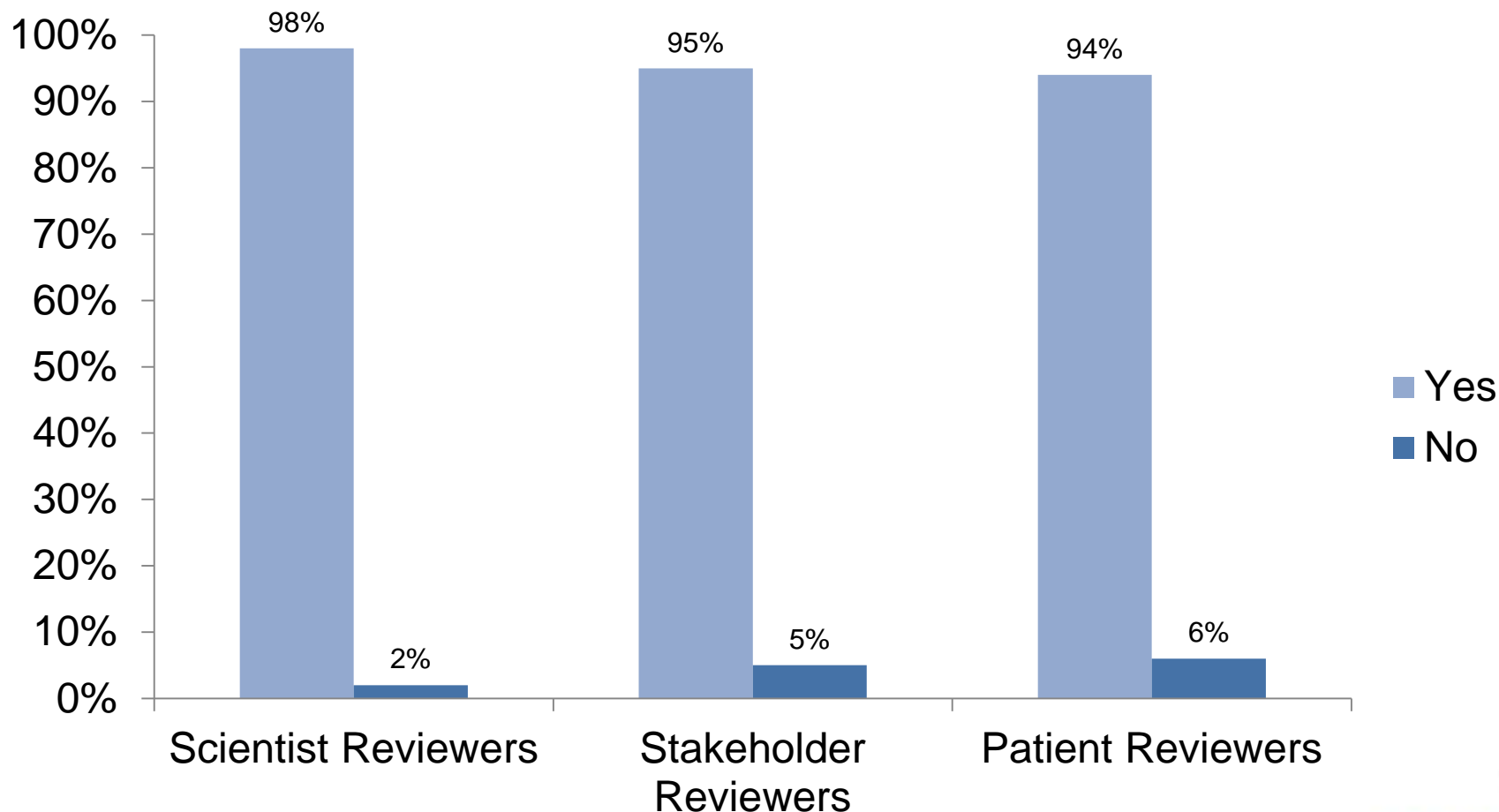
## Overall Impressions of PCORI Merit Review

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***Using a review panel comprised of researchers and non-researchers helped PCORI ensure that selected research proposals were both methodologically rigorous and important to patients and other stakeholders***



# ***Are you interested in participating as a PCORI reviewer again in the future?***



# Conclusions





- PCORI has a unique approach to reviewing research applications
  - Inclusion of patients and other stakeholders intended to obtain and value a range of perspectives
  - Merit review criteria created to ensure research is methodologically rigorous and important to patients and other stakeholders
- Challenges with review criteria and with reviewer process are the focus of intense process improvement



## Opportunities for Improvement

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# Summary of Improvements – One

-  Streamline criteria
-  Streamline written critique format
-  Improve reviewer and chair training
-  Initiate standing panels



# Summary of Improvements – Two

- More clearly define reviewer roles
- Improve communications with reviewers and applicants
- Enhance mentor program



## Panel Discussion

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# Panel Discussion

- What are the benefits of PCORI's approach to merit review?
- In what ways should PCORI's merit review be improved?
- Are different reviewer perspectives elicited fairly through the process?
- What are some of your most meaningful experiences as a PCORI reviewer?

# Become a Reviewer of Funding Applications

- PCORI invites professional and lay audiences to be reviewers of research applications
- Help us support research that will be both scientifically rigorous and truly patient-centered
- Learn more and apply online:  
[www.pcori.org/getinvolved/reviewers](http://www.pcori.org/getinvolved/reviewers)



# Stay Informed

- Training Webinars for Applicants, Dec 2013:  
<http://www.pcori.org/funding-opportunities/funding-announcements/applicant-trainings/>
- Winter 2014 Applications Due: Jan 21, 2014
- Spring 2014 LOIs Due: March 7, 2014
- *Opening a Pipeline to Patient-Centered Research Proposals* webinar  
November 13, 2013, 1:00– 2:00 PM (ET)  
<http://www.pcori.org/events/opening-a-pipeline-to-patient-centered-research-proposals/>

# Thank you!

- Acknowledgements
  - Scientist, patient, and stakeholder reviewers
  - Reviewer panelists
  
- Stay current with email alerts at <http://www.pcori.org/home/signup> and follow us on Twitter @PCORI
  
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