



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



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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)

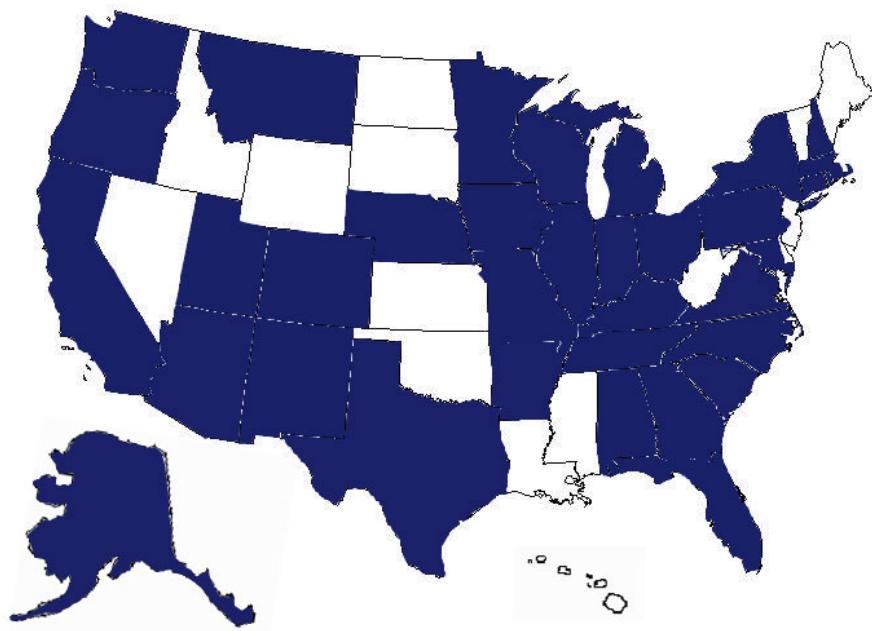


Our Growing Research Portfolio

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



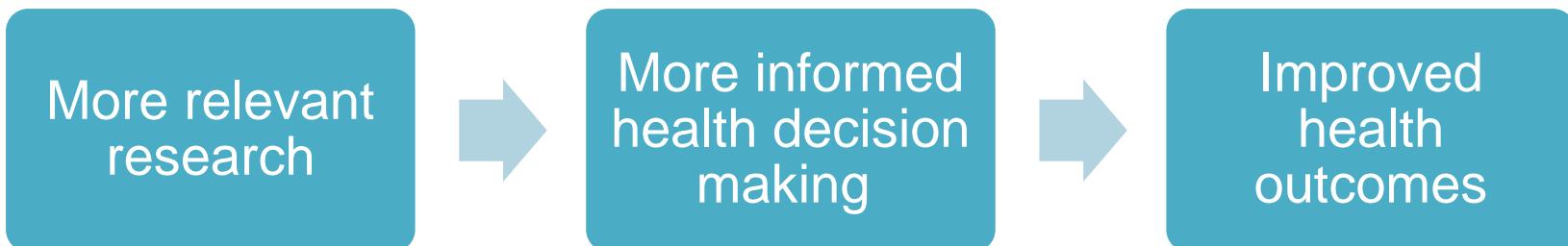
Stakeholders



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



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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

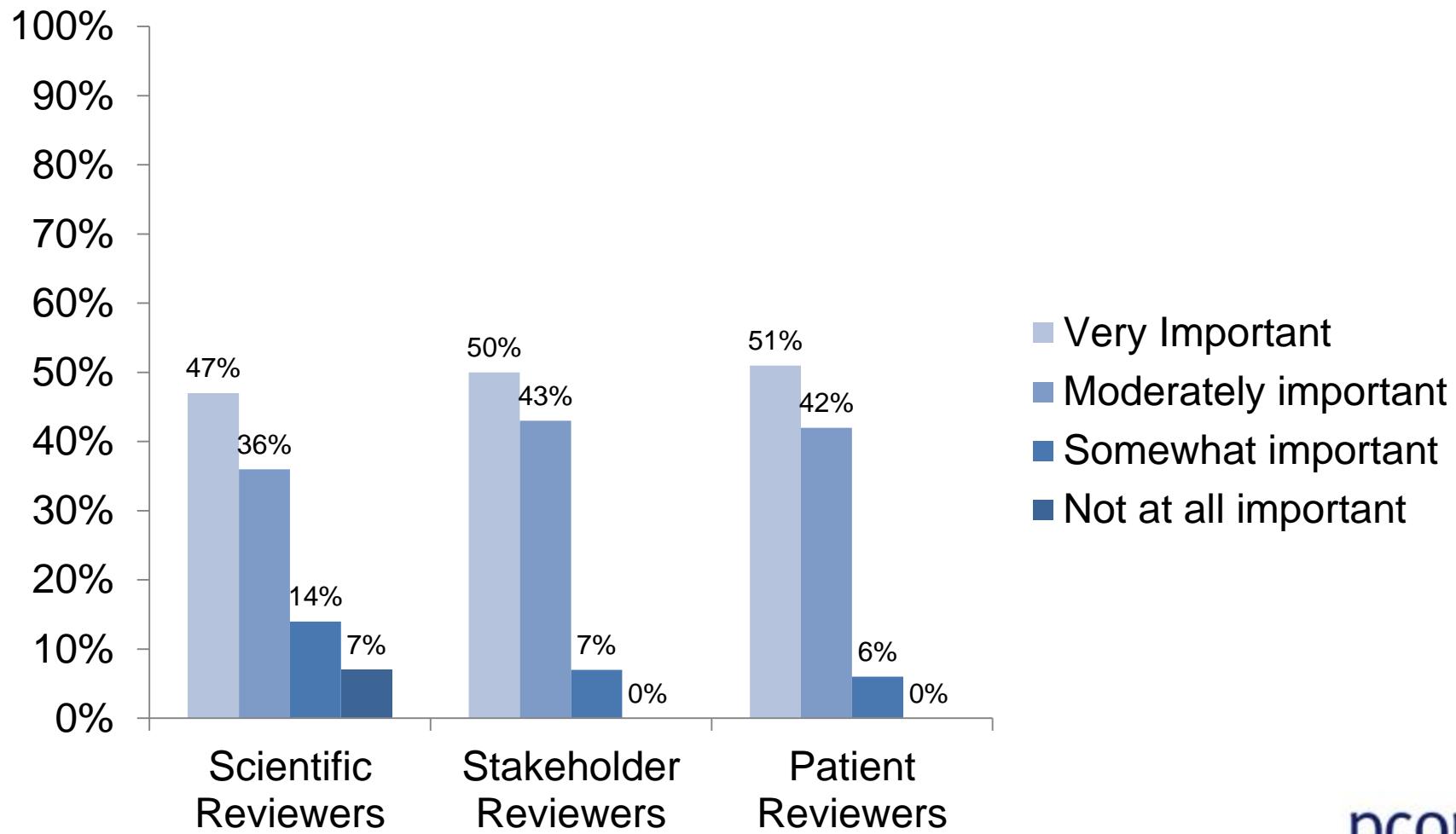




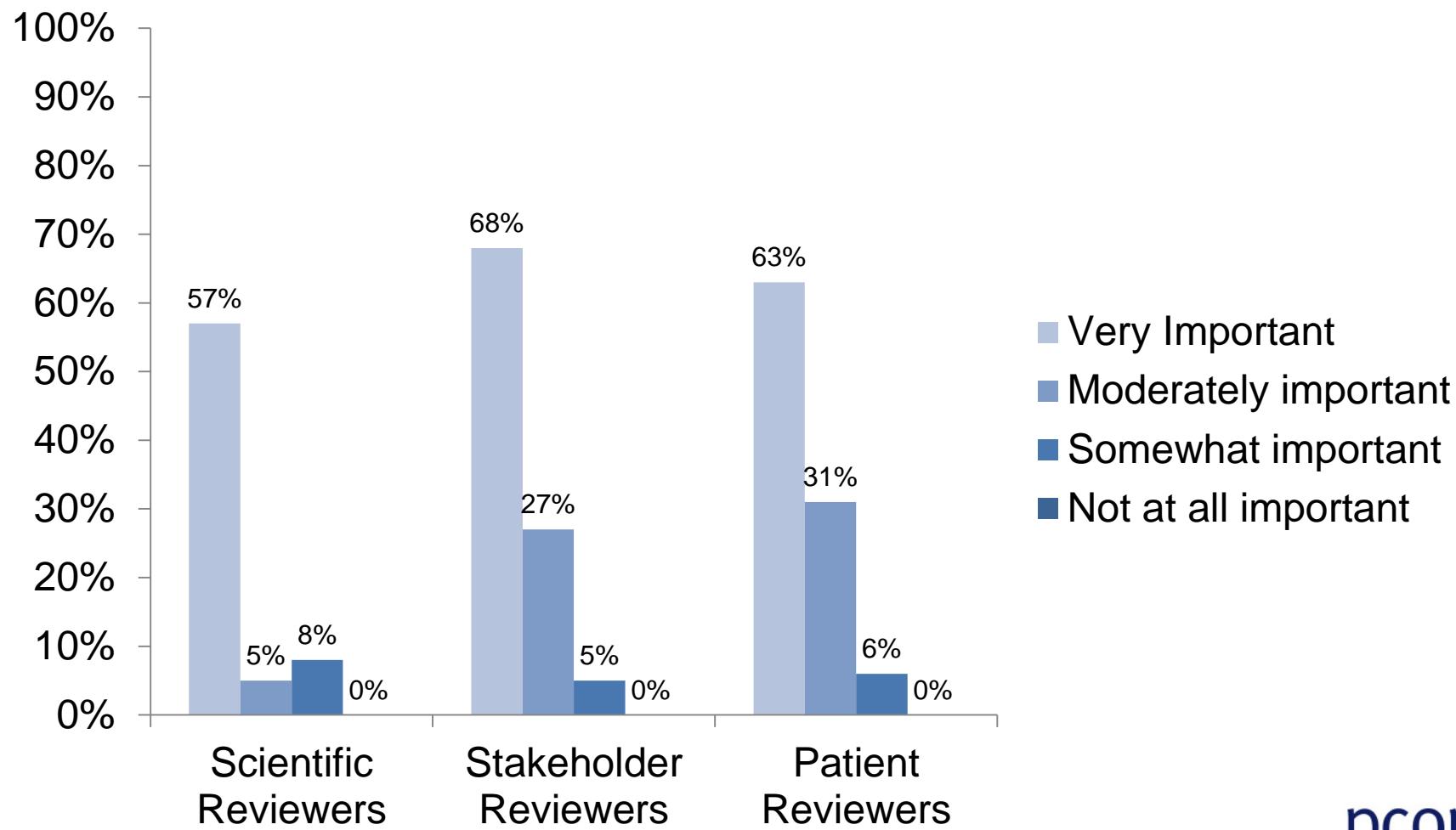
Use of PCORI Criteria

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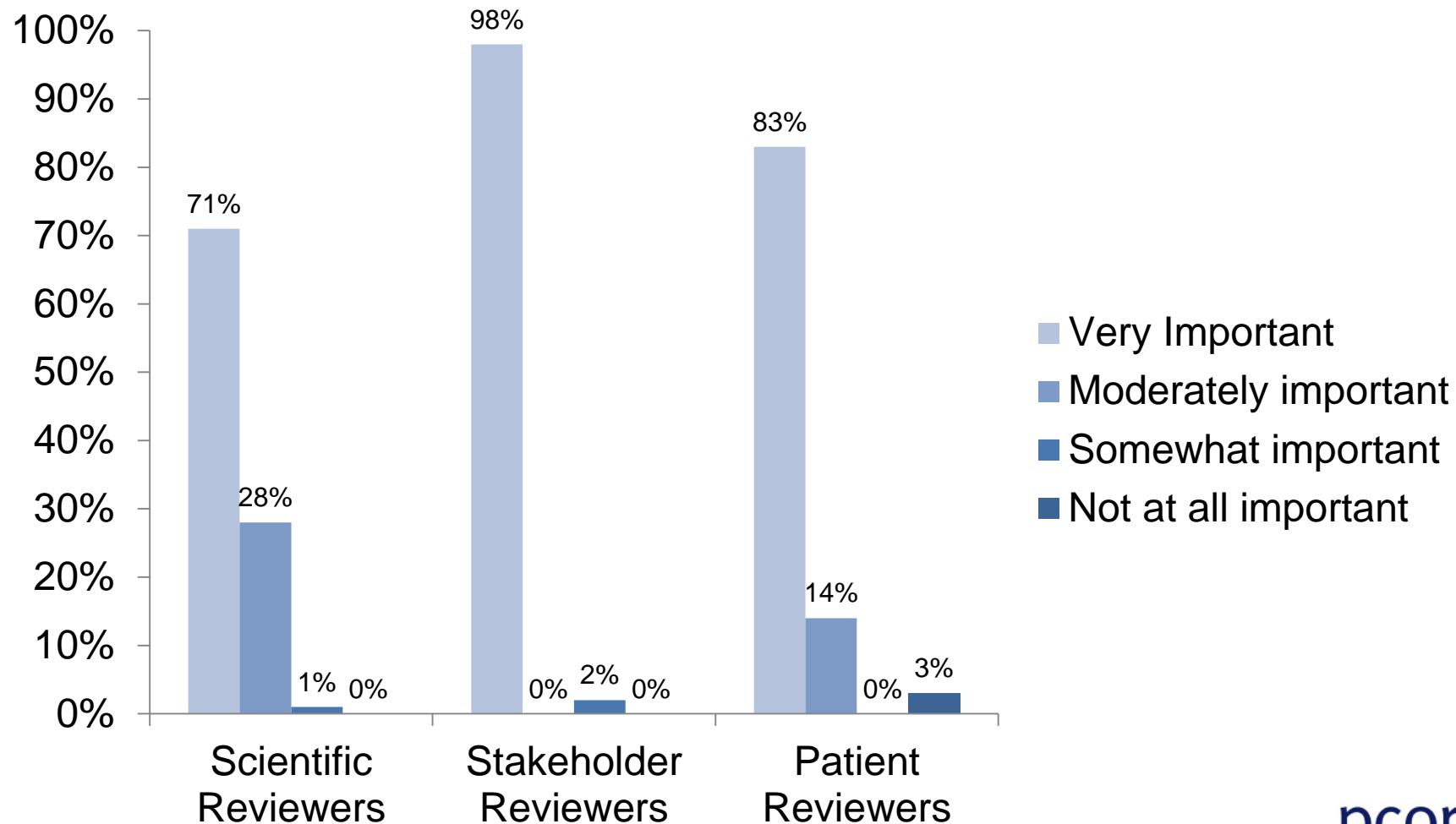
How important was each of the criteria to your final scores? ... Impact of the condition



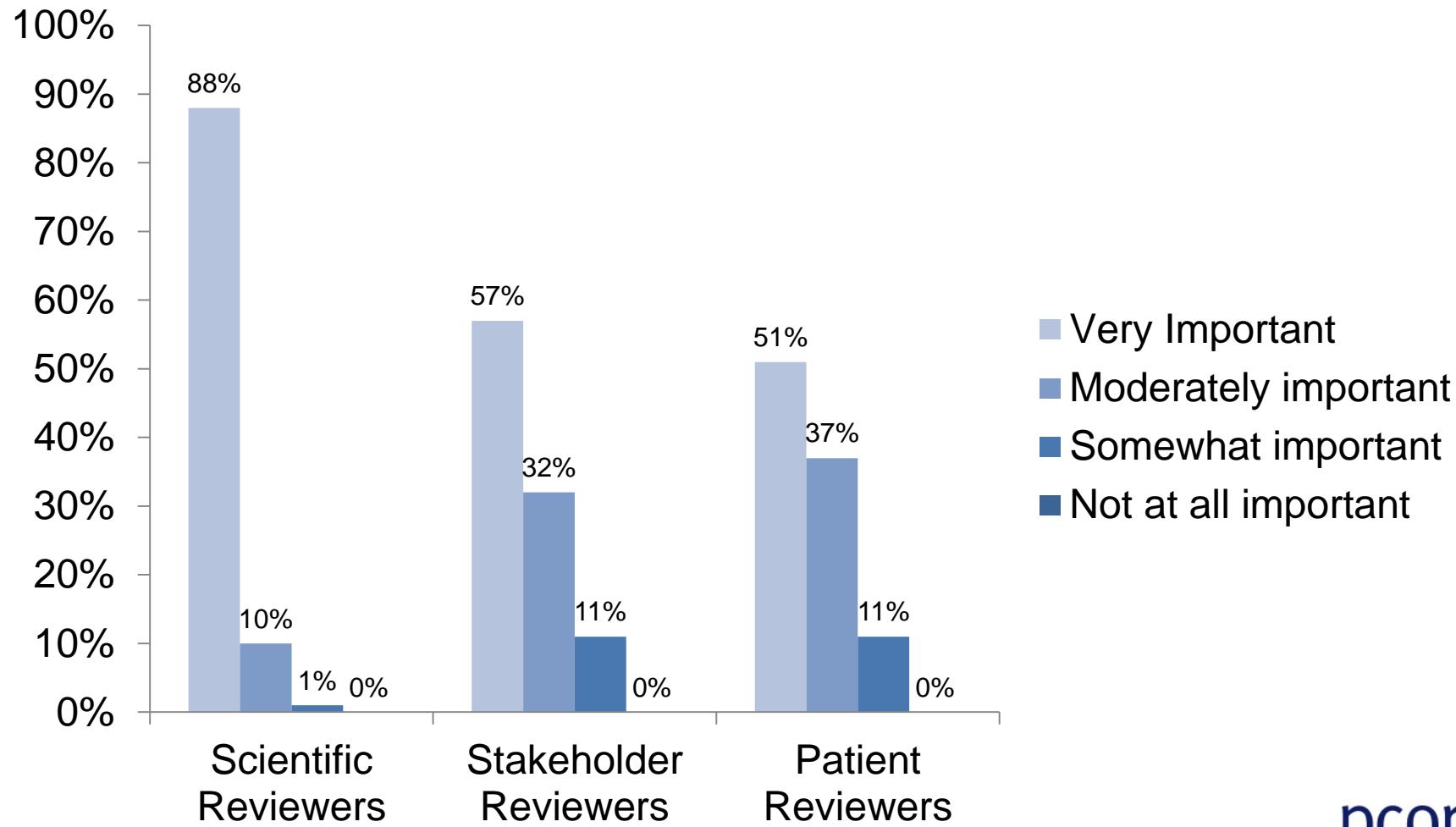
How important was each of the criteria to your final scores? ... Potential for improving care and outcomes



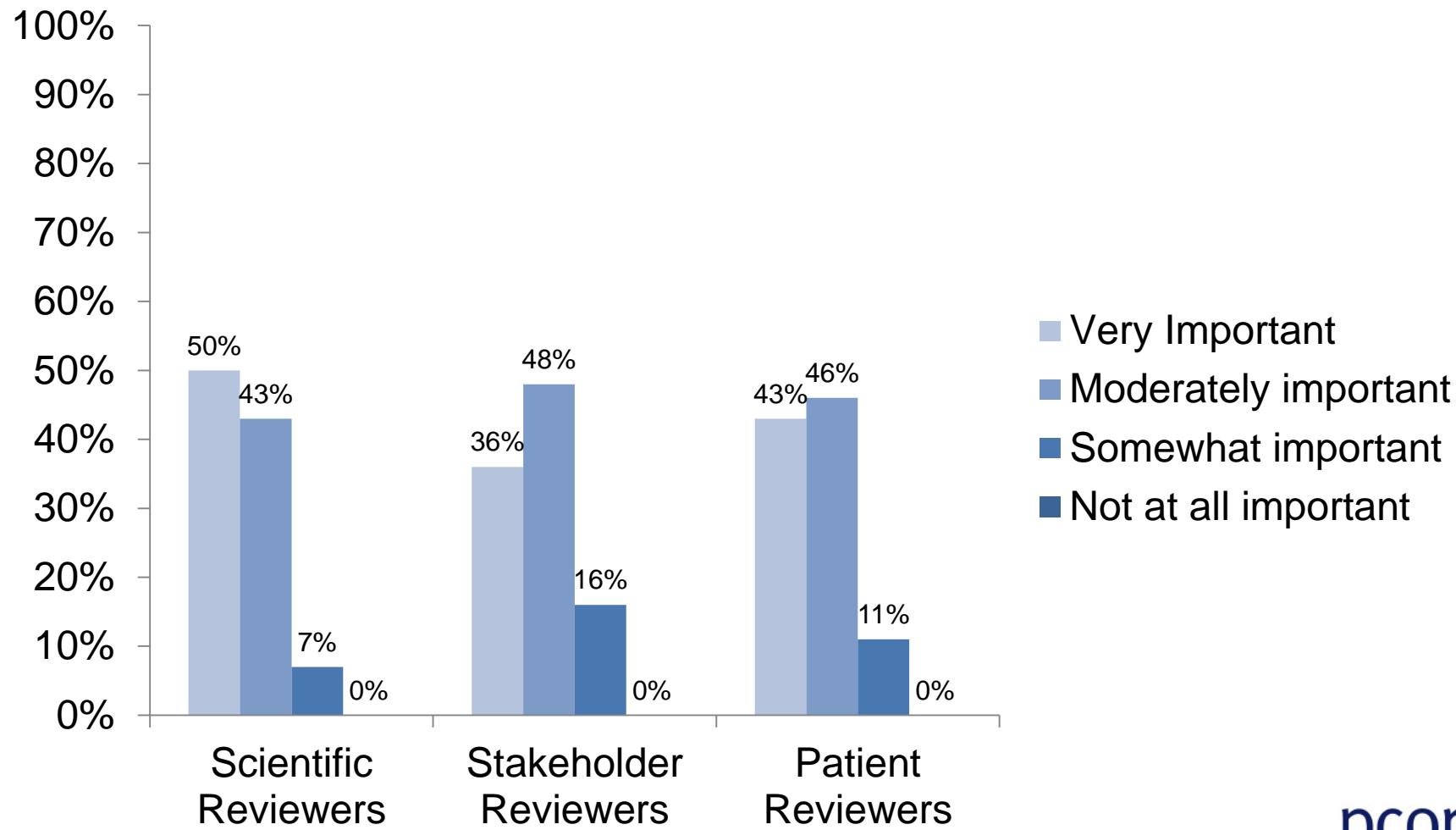
How important was each of the criteria to your final scores? ... Patient-centeredness



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

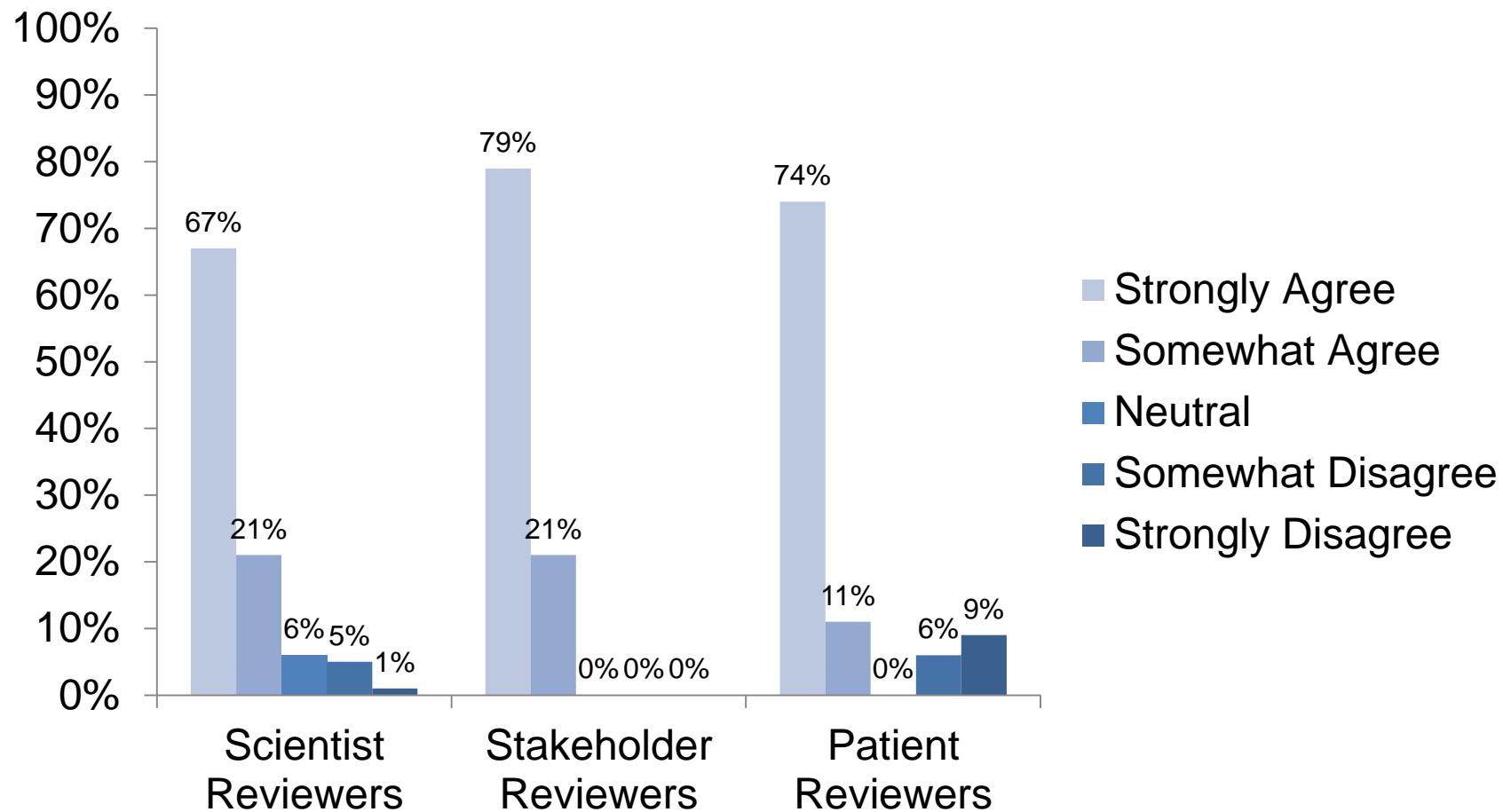
- Need for more guidance about the meaning of criteria and use of a scoring scale
 - *“More emphasis needs to be placed on how to choose a score during the training.”*
- Time burden for review
 - Too many applications to review
 - Written critiques have redundant components



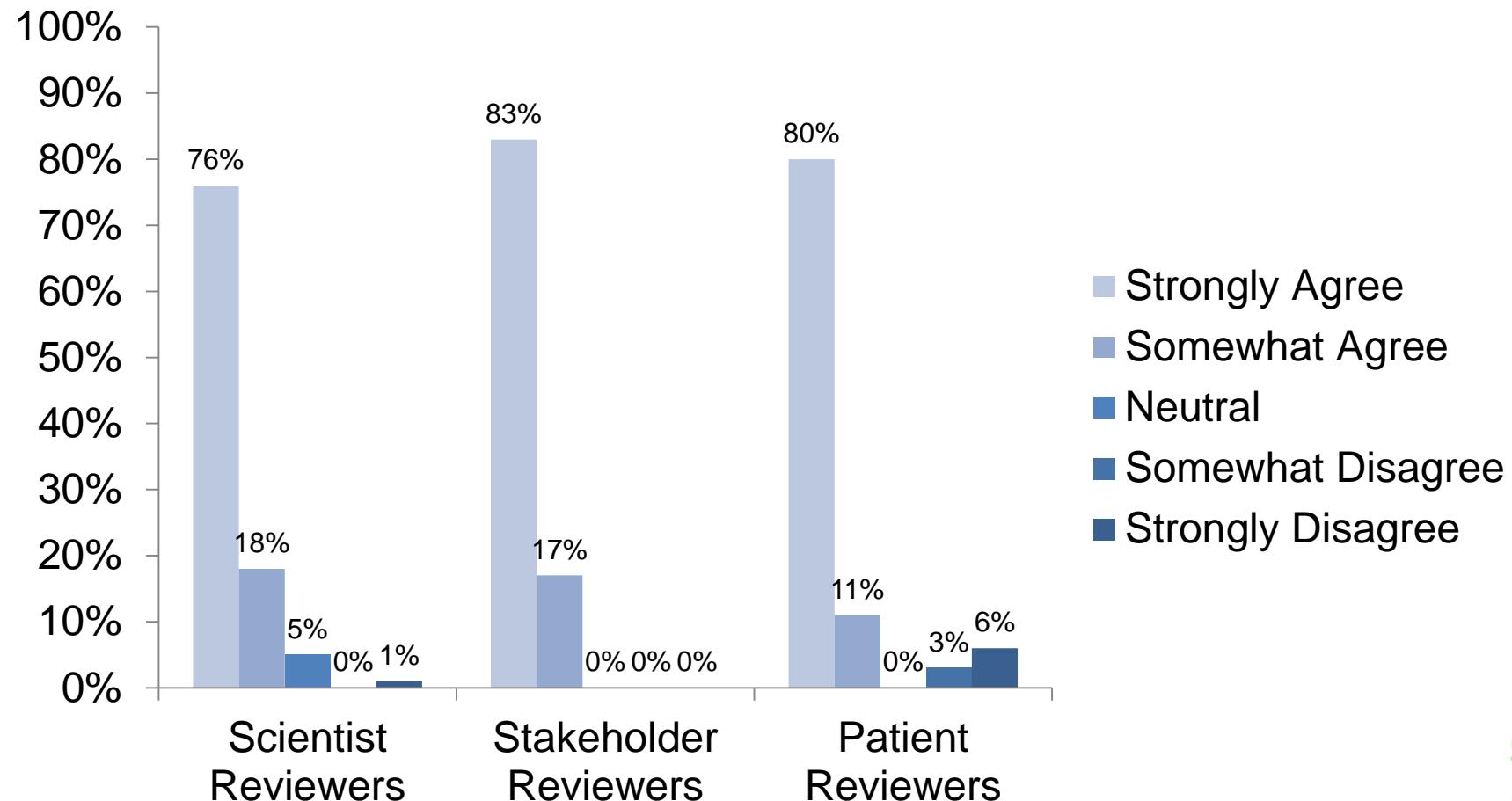
In-Person Panel

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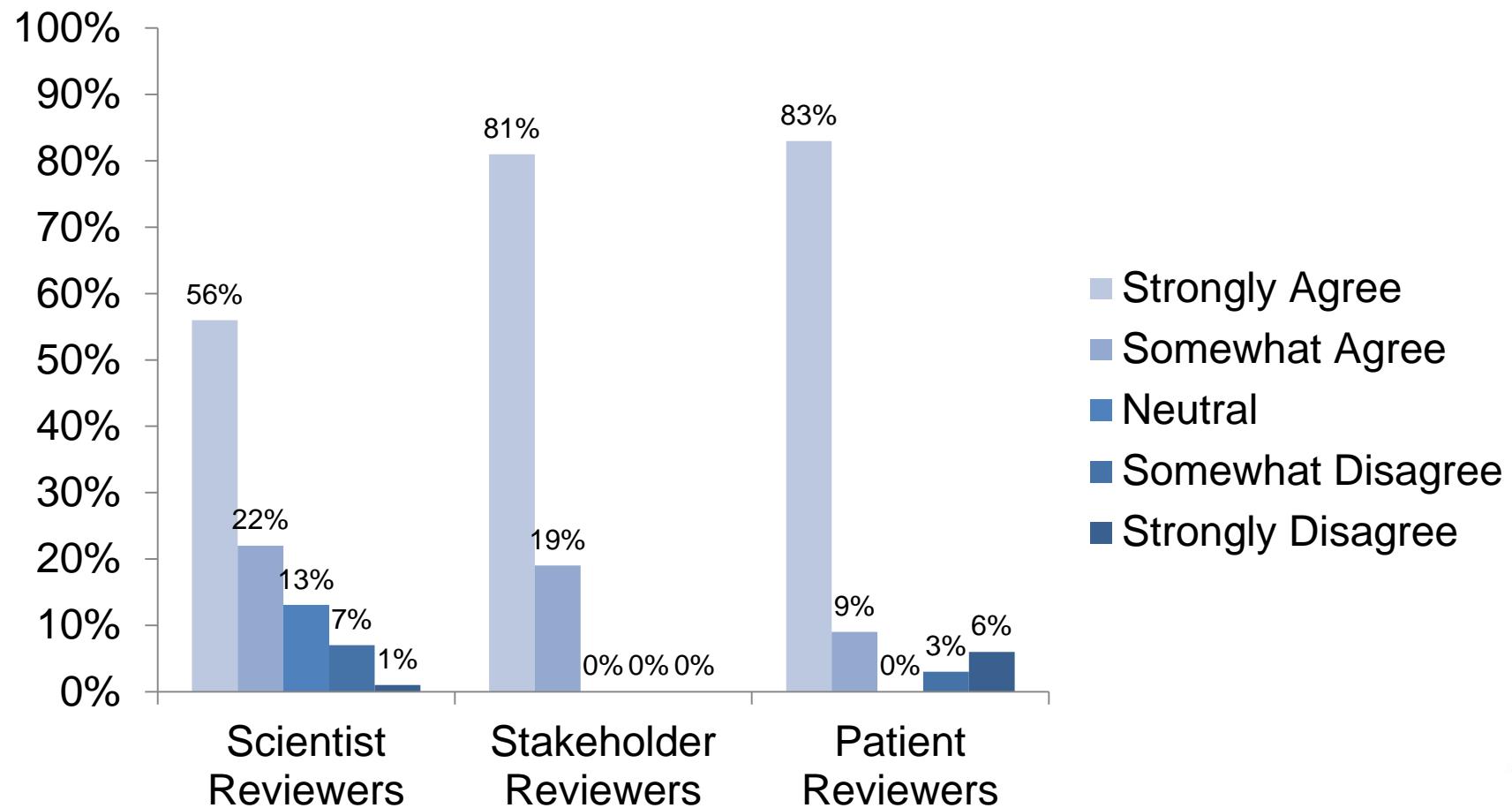
The chair(s) ensured that different points of view were heard



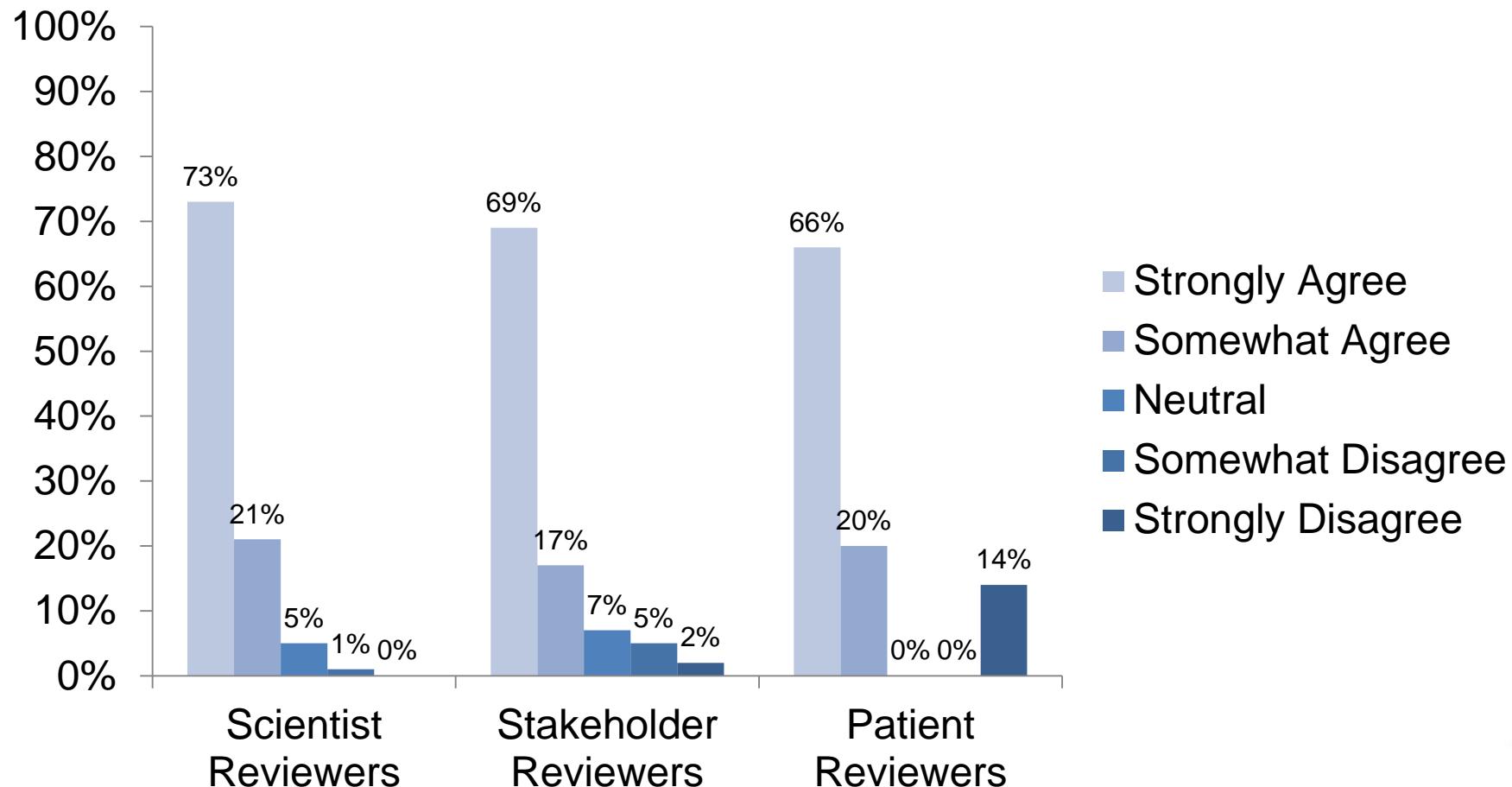
The scientific reviewers provided valuable input during the discussion



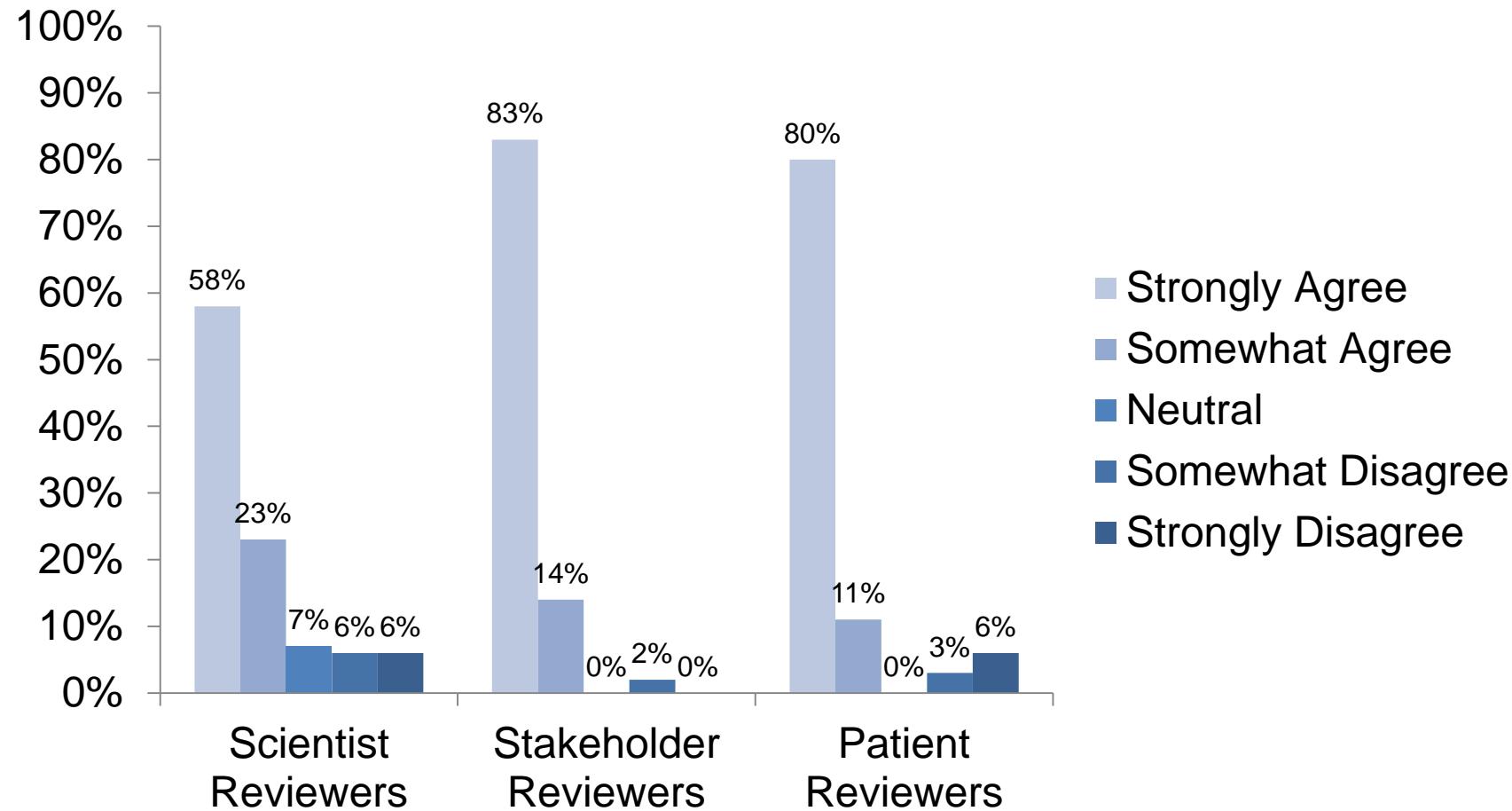
The patient and stakeholder reviewers provided valuable input during the discussion



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

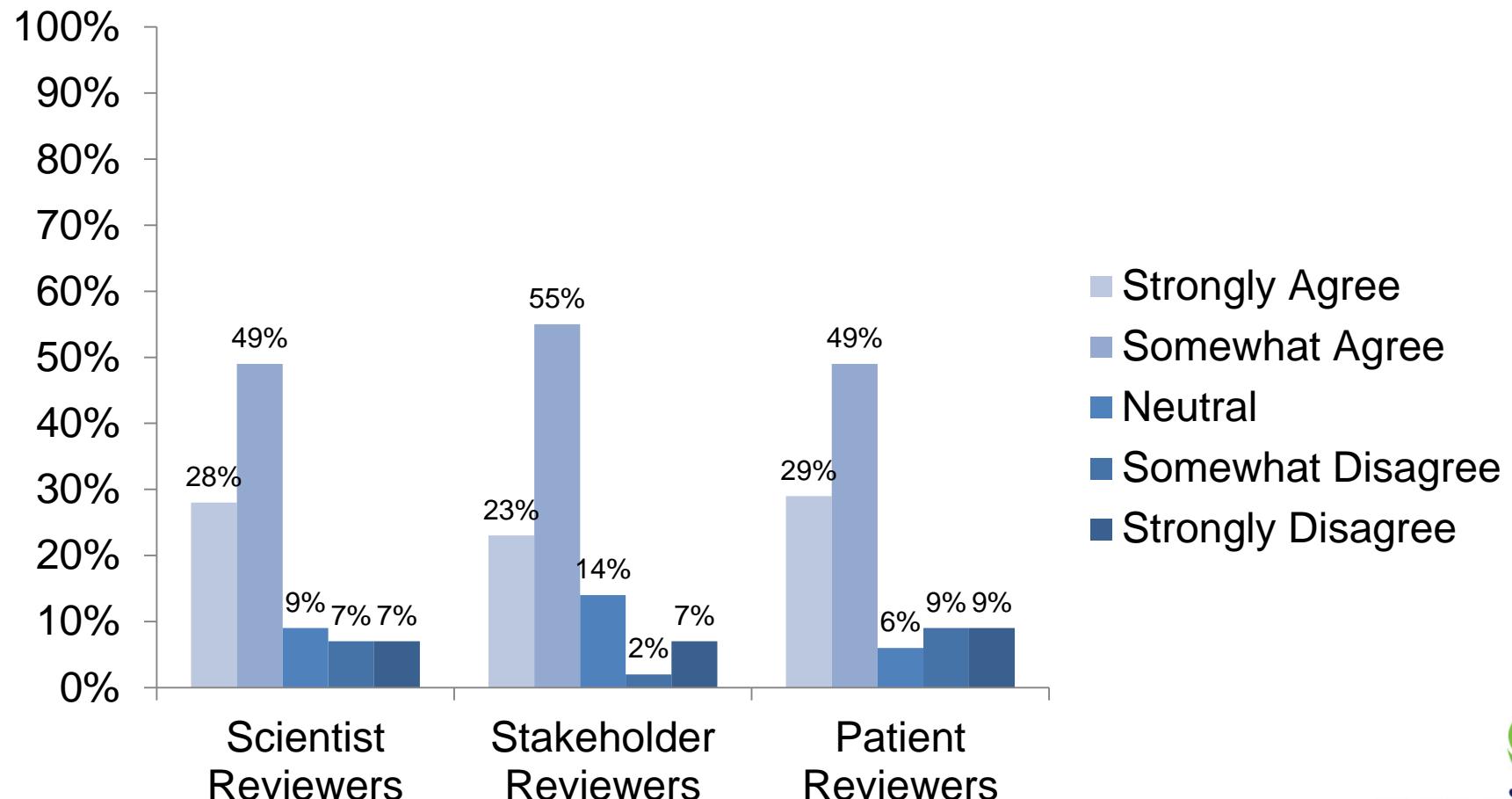
- Mix of reviewers is unique and valued
 - *“It was very rewarding to be part of the process, and I truly believe it resulted in a more substantial and ultimately meritorious consideration of the applications.”*
 - *“As a scientist, I have really learned from the other reviewers, both scientists and 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 ≥ 1 point	51%	48%	50%	57%	0.311
Change by ≥ 2 points	22%	16%	26%	31%	0.001

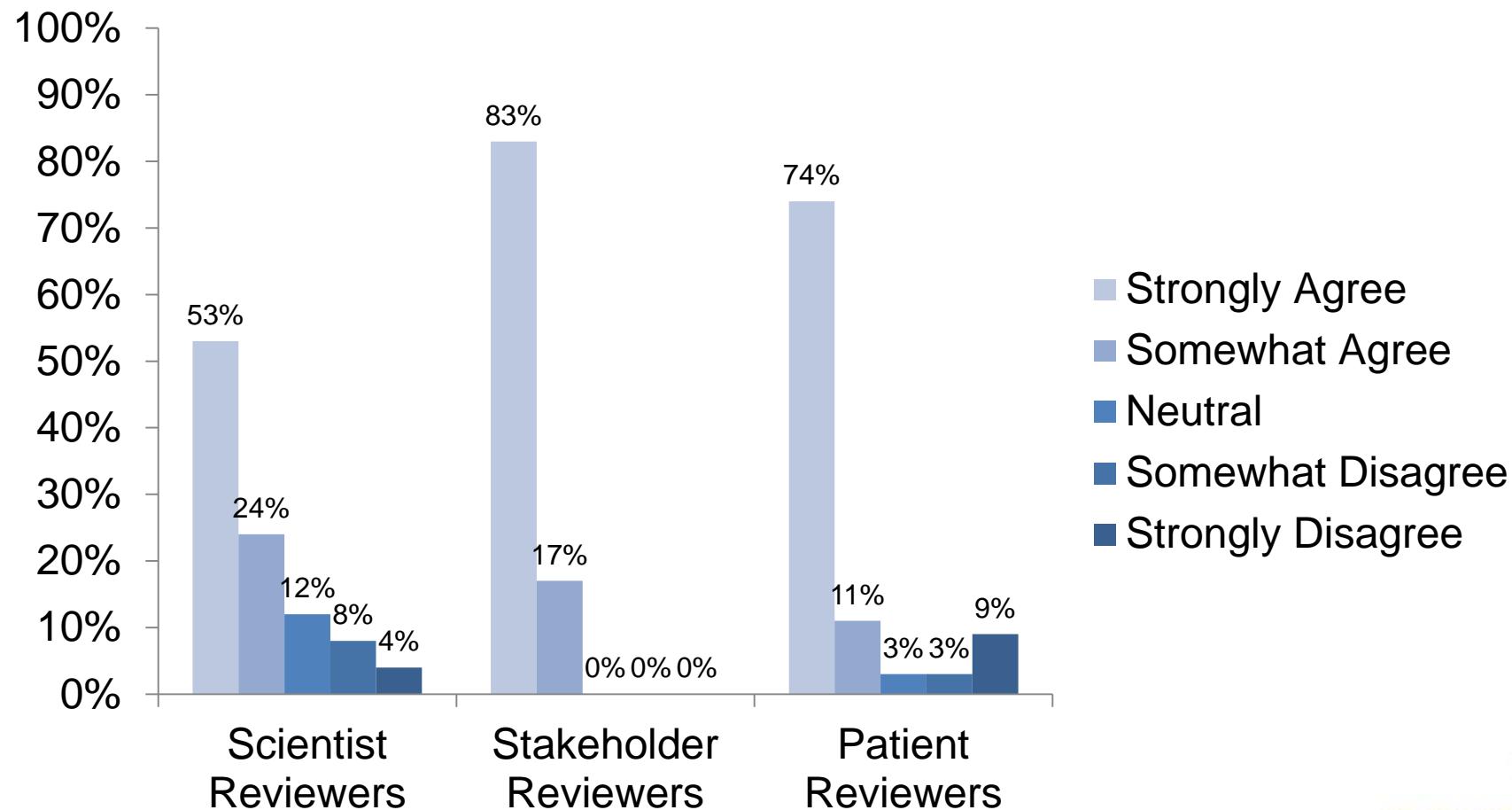


Overall Impressions of PCORI Merit Review

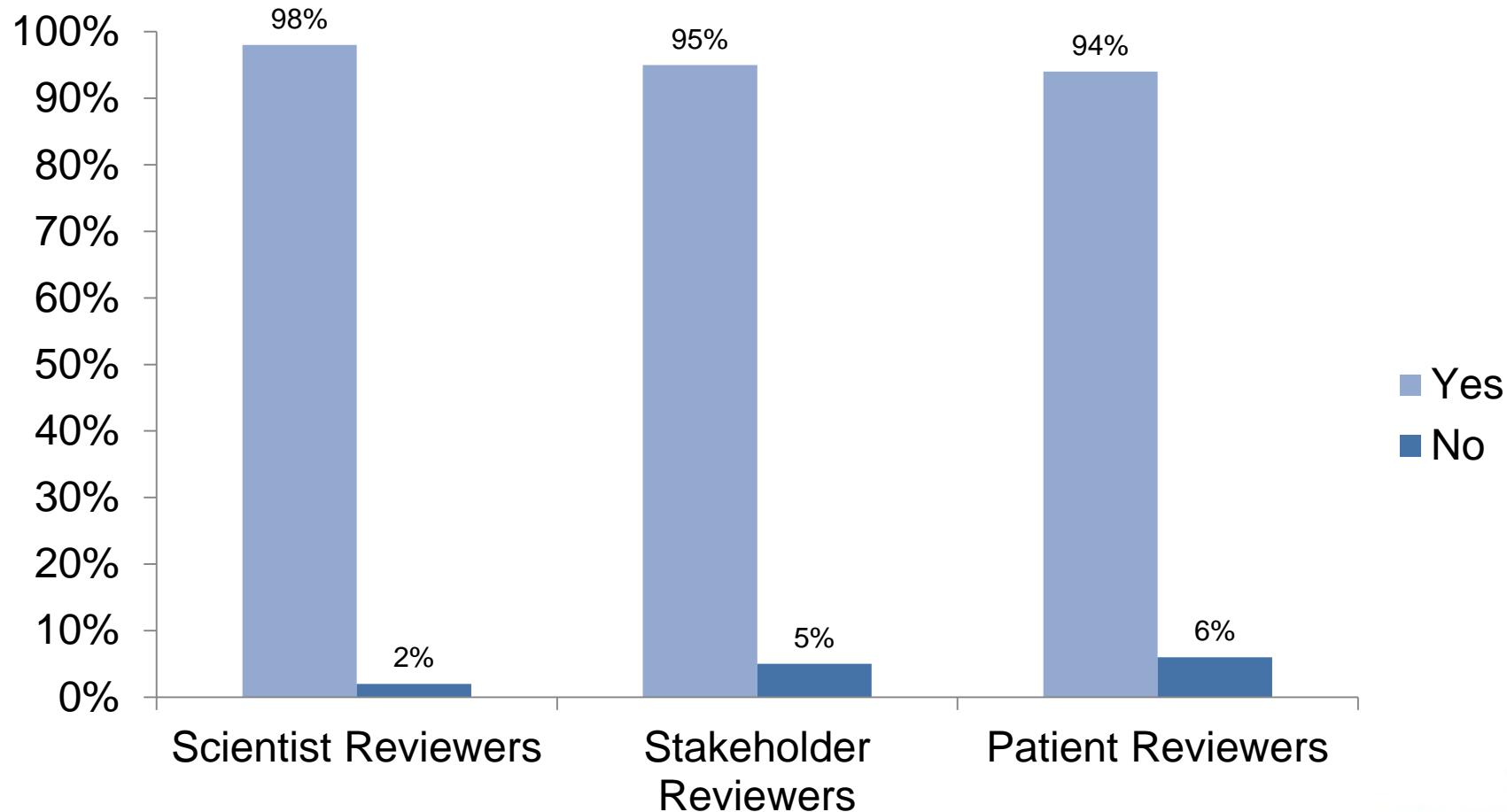
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Using a review panel comprised of researchers and non-researchers helped PCORI ensure that selected research proposals were both methodologically rigorous and important to patients and other stakeholders



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



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/>



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Thank you!

Acknowledgements

- Scientist, patient, and stakeholder reviewers
- Reviewer panelists

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