



Strategic Planning: Pulling It All Together

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PCORI Board of Governors Meeting

Atlanta, GA

November 2013

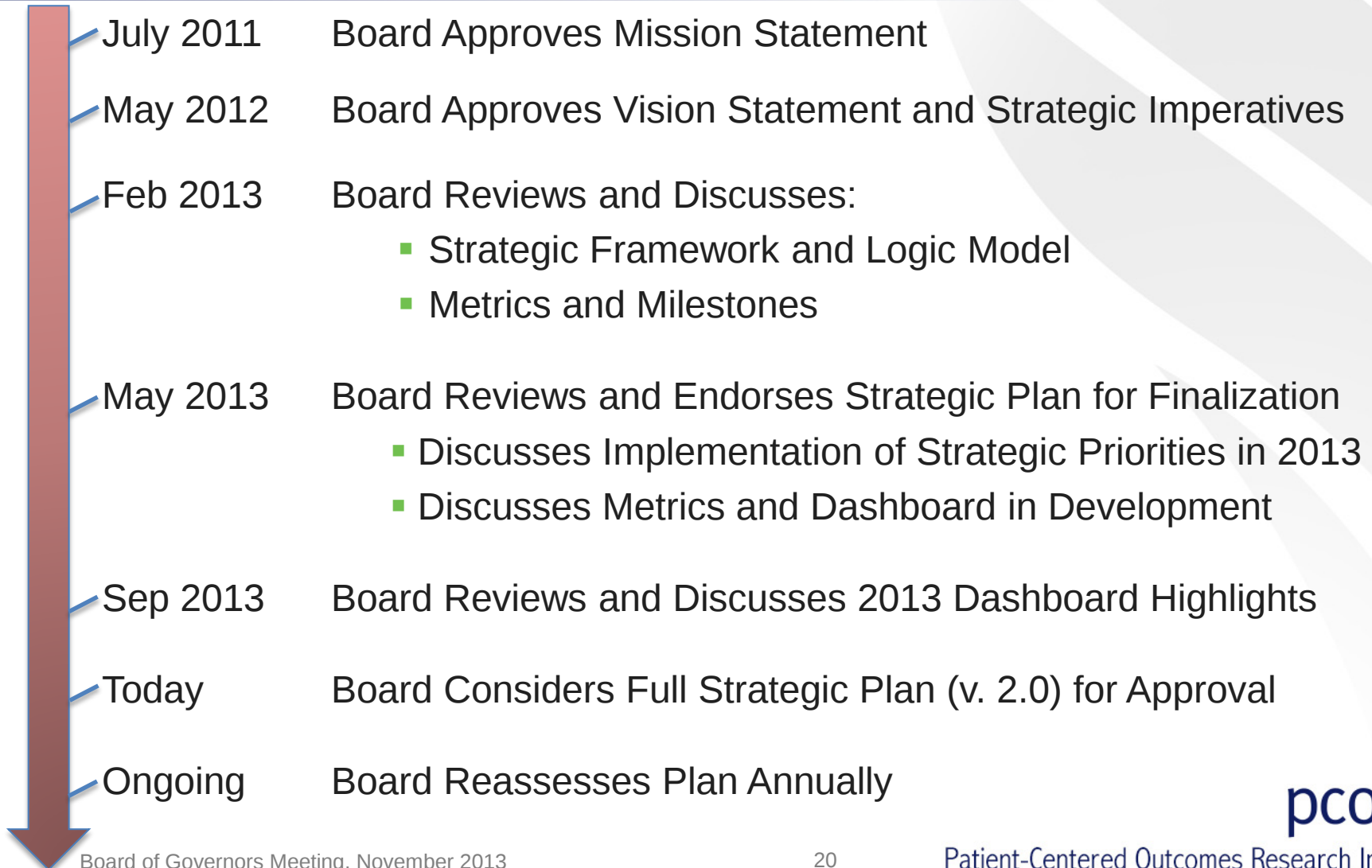
Patient-Centered Outcomes Research Institute

PCORI's Proposed Strategic Plan v. 2.0

***“Plans are worthless,
but planning is everything.”***

President Dwight D. Eisenhower

Recap - Evolution of PCORI's Strategic Plan



PCORI's Mission and Vision

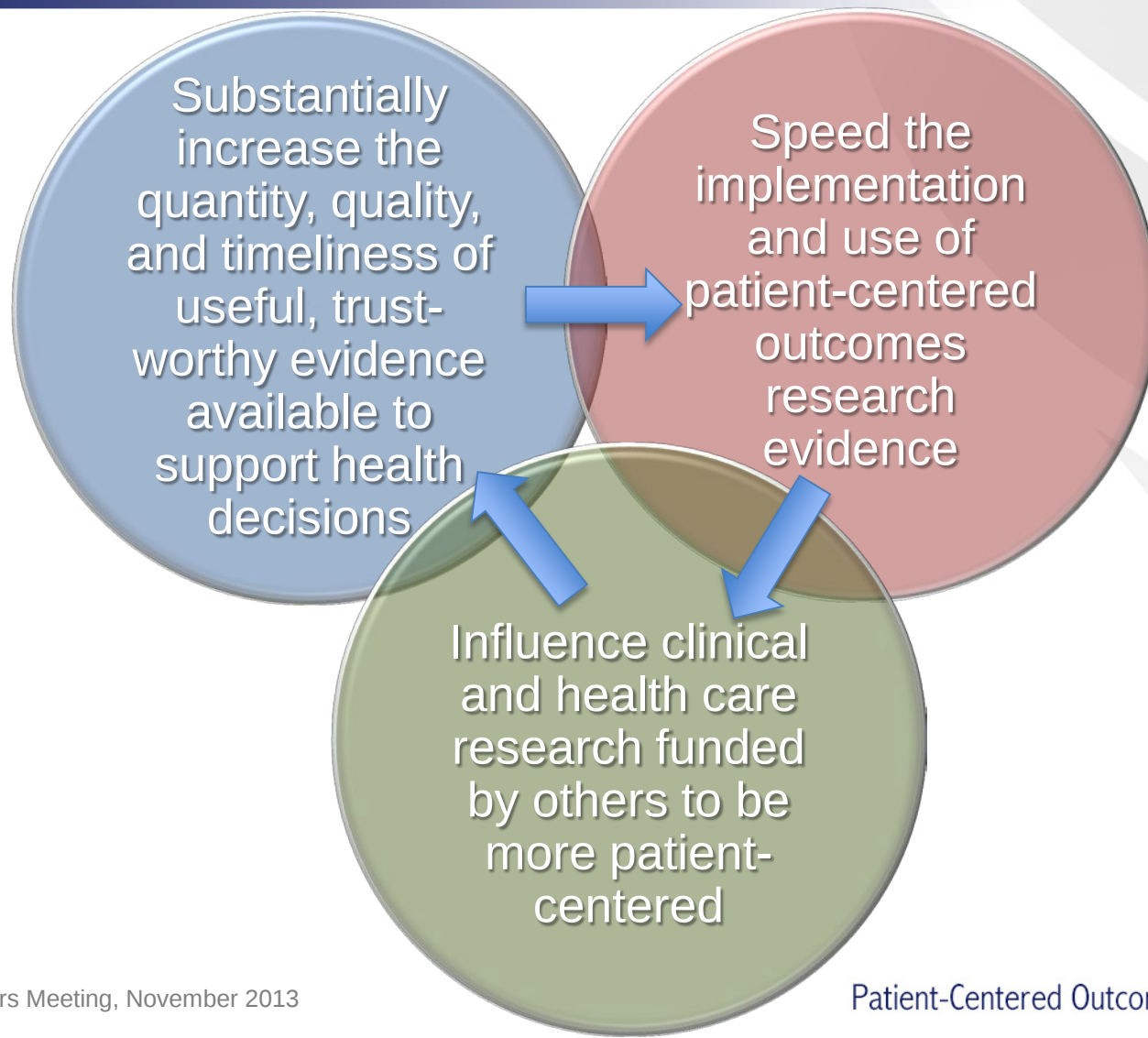
Mission (July 2011)

The Patient-Centered Outcomes Research Institute helps people make informed health care decisions, and improves health care delivery and outcomes by producing and promoting high integrity, evidence-based information that comes from research guided by patients, caregivers and the broader health care community.

Vision (May 2012)

Patients and the public have information they can use to make decisions that reflect their desired health outcomes.

PCORI's Three Strategic Goals



Our Strategic Framework – Mission/Vision

IMPACT

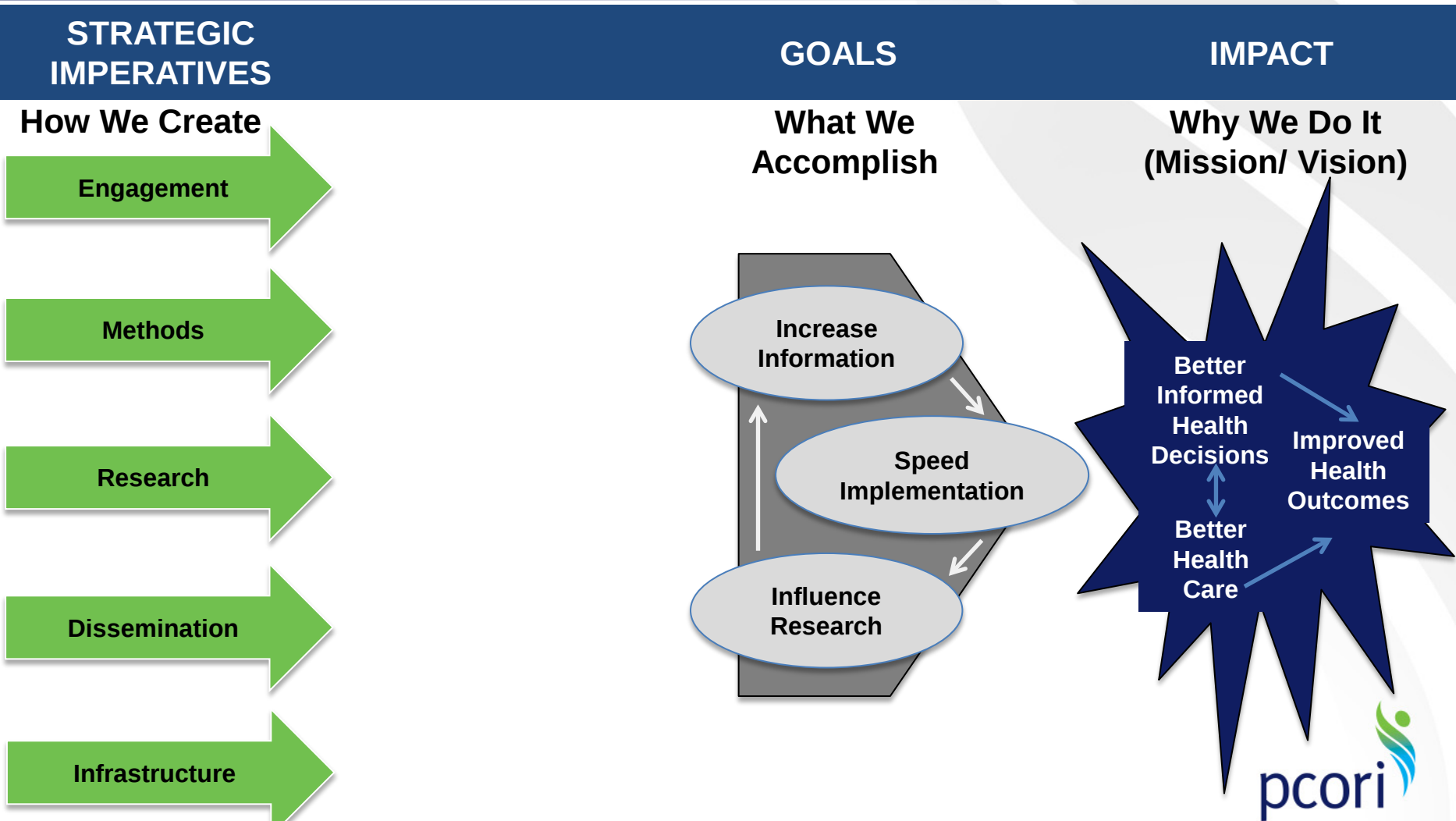
Why We Do It
(Mission/Vision)



Our Strategic Framework – Goals



Our Strategic Framework – Strategic Imperatives



Our Five Strategic Imperatives

To increase information, speed implementation, and influence research, we:

- 🌱 **Engage** patients, caregivers, and all other stakeholders in our entire research process from topic generation to dissemination and implementation of results.
- 🌱 Develop and promote rigorous Patient-Centered Outcomes Research **methods**, standards, and best practices.
- 🌱 Fund a comprehensive agenda of high quality Patient-Centered Outcomes **Research** and evaluate its impact.
- 🌱 **Disseminate** Patient-Centered Outcomes Research to all stakeholders and support its uptake and implementation.
- 🌱 Promote and facilitate the development of a sustainable **infrastructure** for conducting patient-centered outcomes research.

Table of Strategic Priorities and Activities

Strategic Imperative: Research

Strategic Priority: Develop and Fund Research Agenda with High Potential for Impact

2013 Activities

- Refine Topic Generation and Prioritization processes
- Refine Merit Review process
- Fund 3 cycles of research via broad PFAs
- Launch funding for Targeted Topics

2014–2015 Activities

- Continue to refine Topic Generation, Prioritization, and Selection processes
- Continue to refine Merit Review process
- Fund multiple cycles of research via broad and targeted PFAs
- Commit an increased proportion of our funding to focused and targeted topics

Strategic Priority: Manage Research Portfolio Carefully to Maximize Success

2013 Activities

- Implement Portfolio Planning, Management, and Evaluation
- Refine funding application and contracting processes

2014–2015 Activities

- Continue to implement Portfolio Planning, Management, and Evaluation
- Continue to refine funding application and contracting processes

Strategic Priority: Partner with Other Funders to Foster Patient-Centeredness in Research

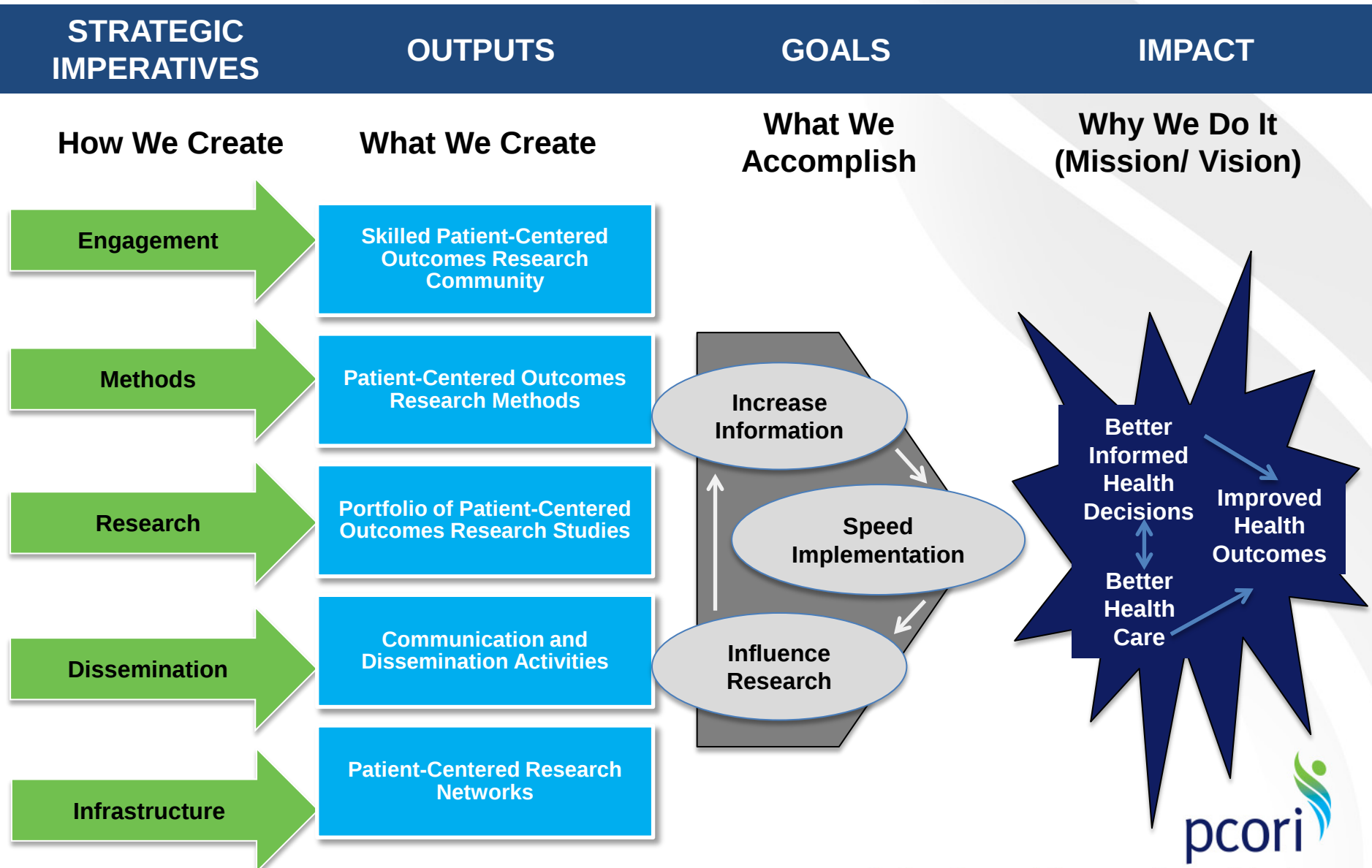
2013 Activities

- Establish mechanisms for co-funding/co-sponsorship

2014–2015 Activities

- Co-fund and co-sponsor studies with AHRQ, NIH, VA, and others

Our Strategic Framework – Outputs Are Early Metrics



ENGAGEMENT

- *Develop Community Skilled in PCOR
- *Engage Community in Research Processes
- *Engage Community in Dissemination

METHODS

- *Develop and Promote Standards for PCOR
- *Fund Development of New PCOR Methods
- *Evaluate PCORI's Methods

RESEARCH

- *Develop Patient-Centered Agenda
- *Target Funding to High Impact PCOR
- *Partner with Other Funders
- *Carefully Manage Research Portfolio

DISSEMINATION

- *Disseminate PCORI Methods Standards
- *Fund Dissemination Research
- *Disseminate Results of PCOR
- *Ensure Accessibility of PCORI Research

INFRASTRUCTURE

- *Develop Patient-Centered Data Networks
- *Expand PCOR Training for Researchers
- *Expand Patient Groups' Capacity for PCOR

Skilled Patient-Centered Outcomes Research Community

Patient-Centered Outcomes Research Methods

Portfolio of Patient-Centered Outcomes Research Studies

Patient-Centered Research Networks

Substantially increase the quantity, quality, and timeliness of useful, trustworthy information available to support health decisions

Strategic Priority: Fund High Impact Research

- Continue refining topic generation, prioritization, and selection processes
- Continue refining merit review process
- Fund multiple cycles of research via broad and targeted PFAs
- Increase funding for focused and targeted topics

Strategic Priority: Carefully Manage Research Portfolio

- Continue refining funding application and contracting processes
- Continue implementing portfolio planning, management, and evaluation

Strategic Priority: Partner With Other Funders

- Co-fund and co-sponsor studies with AHRQ, NIH, VA, and others

Skilled PCOR Community

- Expanded range of funders involved in PCOR

PCOR Methods

- Enhanced methods for:
 - Research prioritization
 - Merit review

Portfolio of PCOR Studies

- Agenda of high priority topics
- Portfolio of studies that are:
 - High impact
 - Useful
 - On-track

Substantially increase the quantity, quality, and timeliness of useful and trustworthy information to support decision making

Speed the implementation and use of patient-centered outcomes research evidence

Influence clinical and health care research funded by others to be more patient-centered

Board of Governors 2013 Dashboard (As of September 30, 2013)

FUNDS COMMITTED FOR EXTERNAL RESEARCH
Total Since Beginning (CY 2012)



Legend

- On Track
- Off Track
- Needs Attention

Communications & Ops (% of Target or Reference)

Communications	Q2	Q3	Q4
Unique Web Visitors (Same Q year-ago)	173	151	-
Email Click-thru Rate (Industry Standard)	183	142	-
Reach (metric in development)	NA	NA	-

Operations

Award to Contract Time (w/in 90 days)	0	16	-
Contracts Response Time (w/in 48 hours)	90	90	-
Science Response Time (w/in 72 hours)	NA	74	-

Our Goals:

Increase Information
Speed Implementation
Influence Research

Impact

199 Projects	\$325M Funds	50 Pilots=\$31M 147 Broad=\$244M 2 Targeted=\$50M 0 CDRN/PPRN=\$0M
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2013 CYTD (Target=\$355-425M)

124 Projects	\$253M Funds	122 Broad=\$203M 2 Targeted=\$50M 0 CDRN/PPRN=\$0M
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Our 2013 Priority Activities

Establish Advisory Panels to Guide Topic Selection

Establish 7 Panels

- ✓ Assessing Options
- ✓ Improving Systems
- ✓ Addressing Disparities
- ✓ Patient Engagement

Panels To Be Formed and Active Q2 of FY 2014

Charters For BOG Approval 11/18

- Rare Disease
- Clinical Trials

Charter In Development

- Communication & Dissemination

Employ Them to Identify High Priority Topics

- ✓ Assessing Options
 - ✓ Addressing Disparities
 - ✓ Improving Systems
 - X Communication & Dissemination
- Will not be active in 2013

Launch Targeted PFAs

Launch – PFAs Issued

- ✓ Severe Asthma For 12/17 Award \$17M
- ✓ Falls w/ NIH Apps due 11/13 \$30M
- ✓ Fibroids w/AHRQ Apps due 12/16 \$20M

Topics in Development

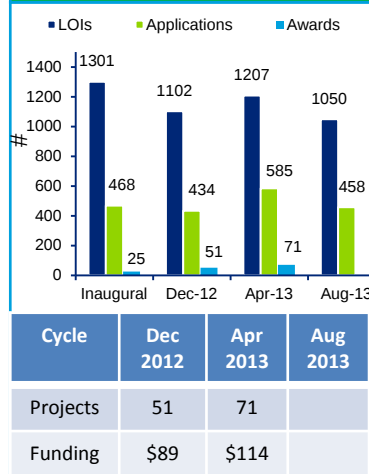
- *Back Pain
- *Obesity
- *DCIS
- *Bipolar Disorder
- *Cardiovascular
- *Perinatal
- *Arthritis
- *Migraine
- *Transitions
- *Empowering Patients

Establish Programs to Build Capacity for PCOR

Engagement Awards

- 3 Awarded – \$566K
- 3 In Process – \$525K
 - Knowledge Awards 1 awarded – \$291K
 - Training/Development Awards 2 awarded – \$275K
 - Dissemination Awards 2 in process – \$275K
- Dissemination Awards 1 in process – \$250K

Fund Research through Broad PFAs



Launch Patient-Centered Research Network

Launch – Awarded

\$9M Coordinating Center ✓
Harvard Consortium

For 12/17 Award

\$12M PPRNs
61 Applications Under Review

\$56M CDRNs
28 Applications Under Review

Develop Skilled Community for PCORI

People Trained to Support PCORI Research Processes

Role	Number
Advisory Panelists	84/84 of those appointed
Merit Reviewers	2357 to date
Mentors	27 to date
Research Awardees	Will start Nov with April 2013 Cycle

Stakeholder Engagement Survey Results – TBD

Launch Plan to Disseminate & Implement Methodology Standards

- ✓ Plan – developed
- ✓ Launch – Standards Required for April PFA; Presented at Academy Health Workshop in June
- Methods Report – to be released at Nov BOG meeting
- Methods Consultation – in development

Develop Evaluation Framework & Baselines

- Framework – for Q2 FY 2014
- Baselines – in development
- ✓ PCORI Evaluation Group – formed; meeting 12/13
- Surveys – AIR enlisted as survey partner; Surveys underway include LOI submitters, applicants, merit reviewers, event attendees

Implement Active Portfolio Management

- Kick-off calls w/ awardees initiated
- Merit Review revised

Develop Dissemination Plan & Infrastructure w/ AHRQ

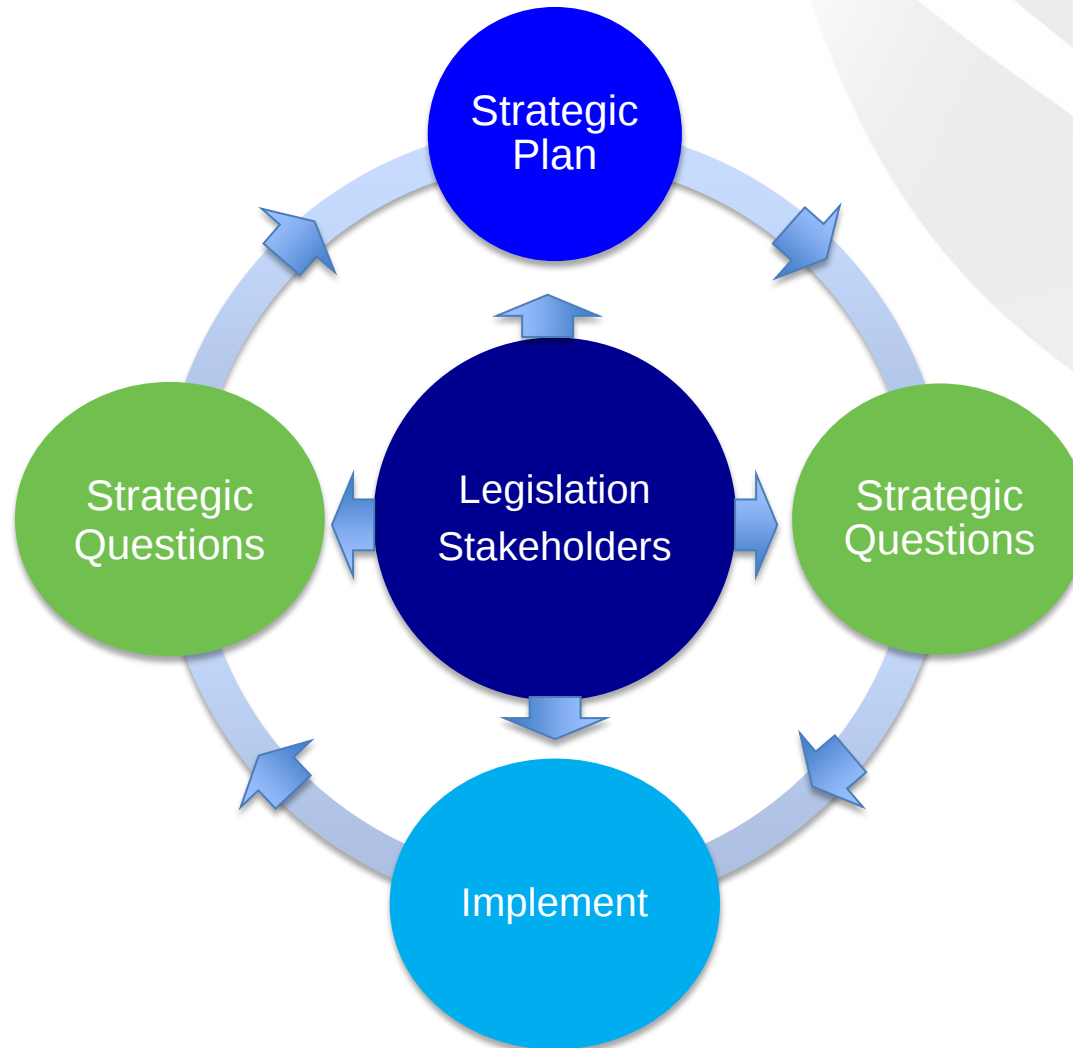
- Plan – in development
- RFP Released 8/30/13
- Due date now Q4 FY 2014

Meaningful Metrics – Defining “Useful”

- Defining usefulness *a priori*:
 - Based on previous work in the field
 - In collaboration with others
 - Based on source of question, reliability, and actionability of findings

- Measuring stakeholder views of usefulness:
 - Patients and caregivers
 - Clinicians, professional organizations
 - Payers, purchasers

Strategic Planning



Strategic Questions

- Optimal mix of targeted and broad funding opportunities?
- Optimal pattern of PCORI commitment of research funds, 2014-2019?
- Proportion of funding PCORI should invest through co-funding?
- Optimal balance of research funding PCORI dedicated to “decision-support” and “primary CER” studies?
- Appropriate relationship between dissemination activities and implementation activities?
- Should PCORI aim specifically to attract and support new investigators?
- How can PCORI support open science?

Board Vote: Strategic Plan Document

Call for a Motion to:

- **Approve** the Strategic Plan Document

Call for the Motion
to Be Seconded:

- **Second** the Motion
 - If further discussion, may propose:
 - An **amendment** to the motion
 - An **alternative** motion

Vote:

- Vote to **Approve** the **Final** Motion
 - Ask for votes in favor
 - Ask for votes opposed
 - Ask for abstentions