

Title: Practical Tools for Facilitating Engagement

Authors (role): M. Suzanne Schrandt (Other, PCORI), Chineye Anyanwu (Other, PCORI), Lisa Stewart (Other, PCORI), Michelle Johnston-Fleece(Other, PCORI), Sunbo Igho-Osagie (Other, PCORI)

The Patient-Centered Outcomes Research Institute (PCORI) was created in 2010 and tasked with funding high-impact clinical research that engages patients and other stakeholders throughout the entire study process. To receive PCORI funding, applicants must demonstrate meaningful involvement of patients and other stakeholders. During early rounds of funding, applicants voiced confusion about addressing these engagement requirements, and requested that PCORI provide guidance. Hesitant to institute strict guidelines given the evolving nature of engagement in research, PCORI set out to produce an engagement tool for use by applicants, awardees, and others interested in PCOR. Through a qualitative coding exercise encompassing 150 PCORI-funded proposals, staff created the PCORI Engagement Rubric, aligned it with our methodology standards on patient-centeredness and the six PCOR principles. It was then further refined by the PCORI Patient Engagement Advisory Panel. A practical instrument that features engagement examples from PCORI-funded projects, the rubric has become a seminal tool for explaining and facilitating engagement, both within and outside of PCORI. The rubric has also become a springboard for other engagement efforts including the creation of Engagement Officers (staff members tasked specifically with overseeing and cultivating engagement in funded awards) and the PCORI Compensation Framework (a tool for evaluating level of effort and appropriate financial compensation for engagement partners). The utility of these tools and the need for additional tools has compelled us to begin to create a comprehensive “Engagement Toolkit”, built on the promising practices emerging from our own funded projects as well as engaged research funded by others.