



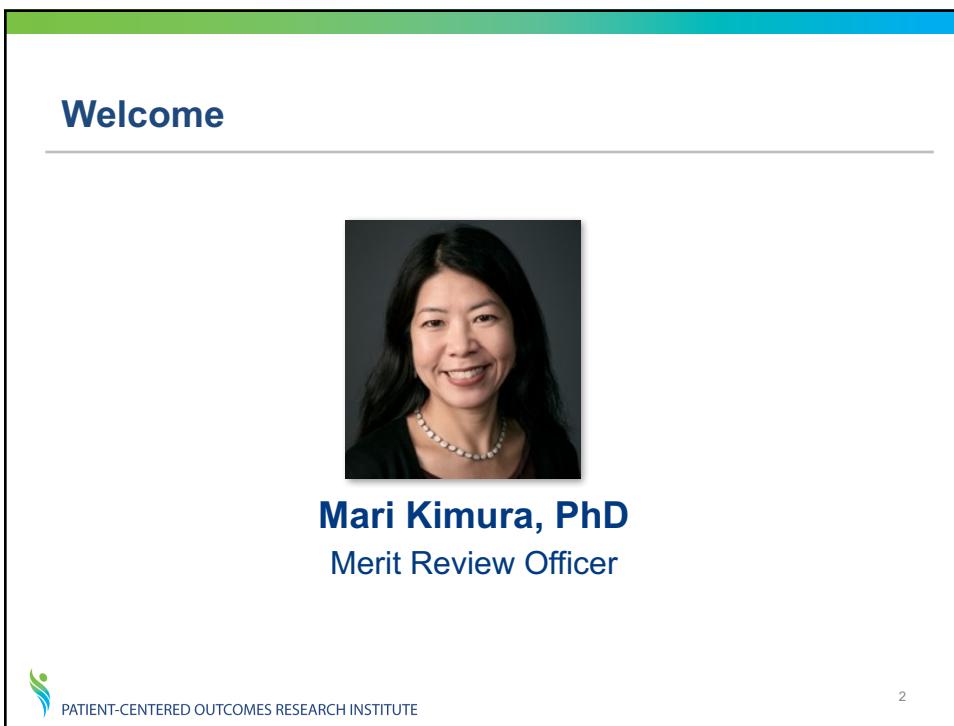
The slide features a decorative background with green and blue wavy patterns in the top right corner. The title 'PCORI Merit Review Demystified' is centered in bold blue text. Below it, the speaker's name 'Mari Kimura, PhD' and title 'Merit Review Officer' are listed. The date 'April 11, 2017' is at the bottom left. The PCORI logo and its full name 'PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE' are at the bottom center.

## PCORI Merit Review Demystified

**Mari Kimura, PhD**  
Merit Review Officer

April 11, 2017

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The slide has a decorative header bar with green and blue gradients. The word 'Welcome' is centered in bold blue text. Below it is a portrait of Mari Kimura, PhD. Her name and title are listed below the portrait. The PCORI logo and its full name are at the bottom center.

## Welcome



**Mari Kimura, PhD**  
Merit Review Officer

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## Session Objectives

- Outline the Merit Review process
  - What happens to applications after submission?
  - How do the reviewers evaluate applications?
  - What kind of guidance do we give reviewers?
- Answer your merit review questions



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## Goals of PCORI Merit Review

- Identify applications that have the strongest potential to help patients, caregivers, clinicians, policymakers and other healthcare system stakeholders make informed decisions to improve patient outcomes.
- Implement a transparent, fair, objective, and consistent process to identify these applications.
- Elicit high-quality feedback that reflects a diversity of perspectives to ensure that the PCORI-funded research reflects the interests and views of patients and other stakeholders and those who care for them, and that it meets the criteria for scientific rigor.



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## Goals of PCORI Merit Review

- Fund projects that fill important evidence gaps and have strong implementation potential.
- Regularly evaluate and continually improve the merit review process and policies in support of PCORI's mission.



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## Building an Inclusive Merit Review

- Panels include scientists, patients, and other stakeholders to bring diverse perspectives to the review process.
- Each application is assigned to 3 scientists, 1 patient, and 1 other stakeholder.
- Chair facilitates discussion



**Patients**



**Scientists**



**Other Stakeholders**



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## Reviewer Eligibility

- Scientists
  - Advanced degree in health or research-related field
  - Relevant peer-reviewed publications
  - Active research program in a relevant field of study
- Chairs
  - National reputation in research area
  - Demonstrated leadership experience



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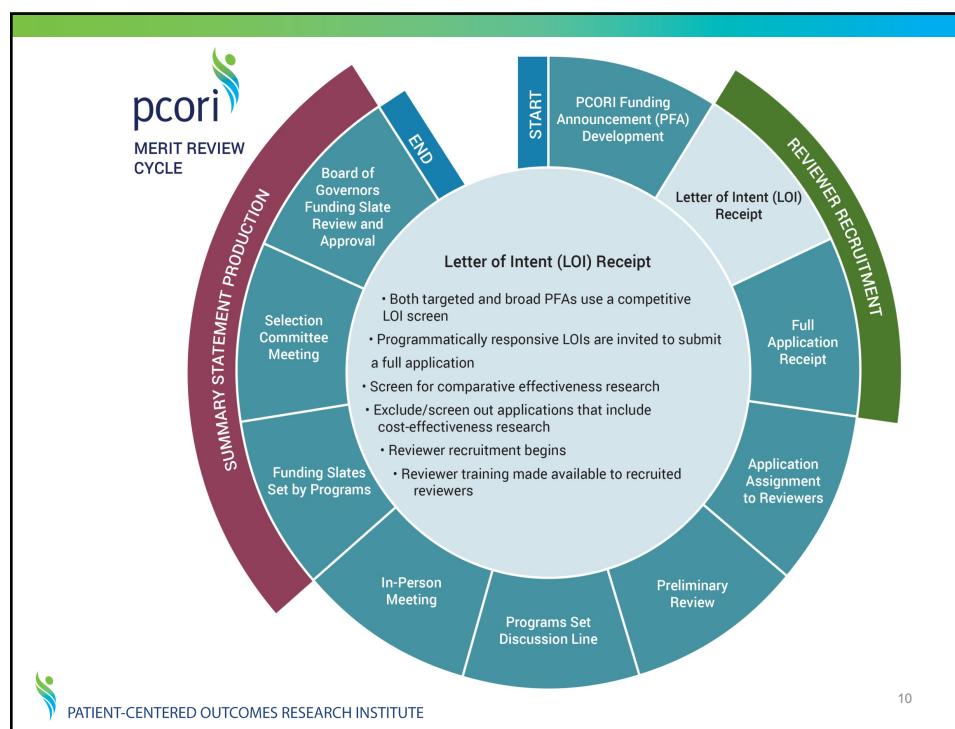
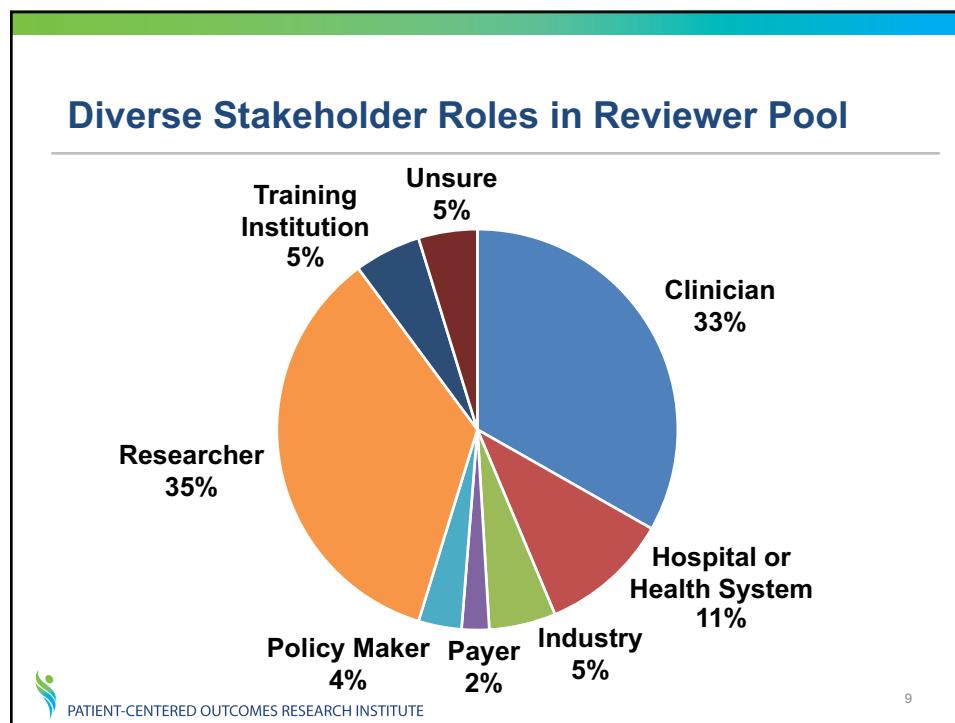
## Reviewer Eligibility

- Stakeholders
  - Contribute a unique healthcare system perspective
- Patients
  - Patient advocates
  - Caregivers
- Excluded
  - Board of Governors
  - Selection Committee members
  - Applicants

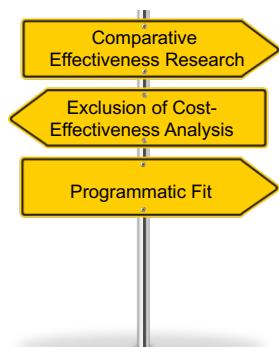


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## Responsiveness Review



- Letters of intent (LOIs) are reviewed (by PCORI or external reviewers) based on criteria detailed in each PCORI funding announcement (PFA).
- Additional screening for
  - Comparative effectiveness research
  - Exclusion of cost-effectiveness analysis
  - Programmatic concerns
- Only responsive LOIs will be invited to submit a full application.



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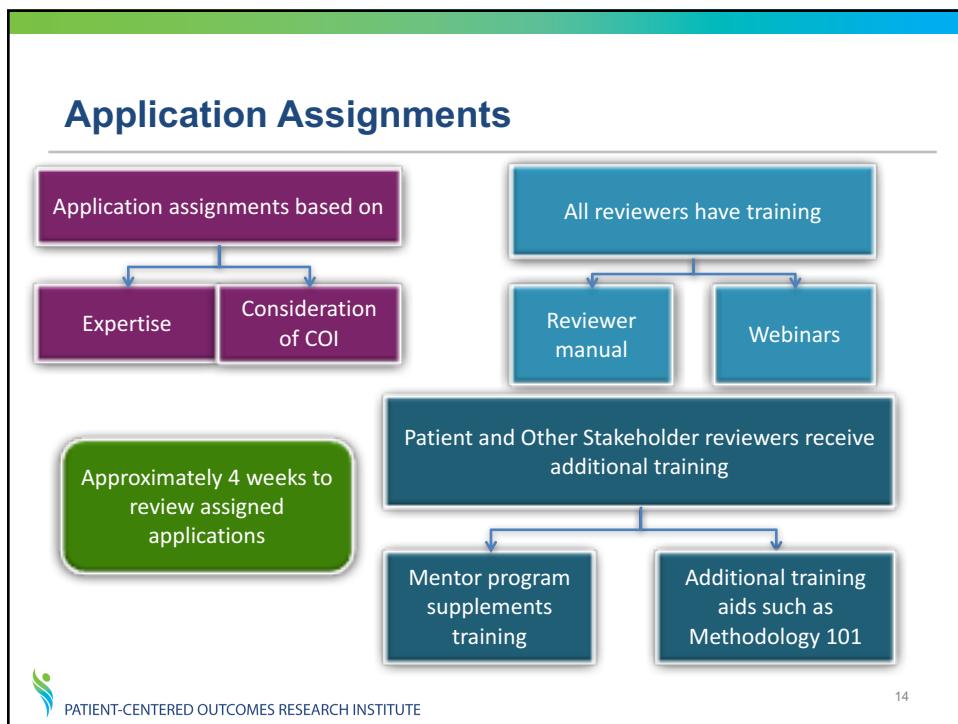
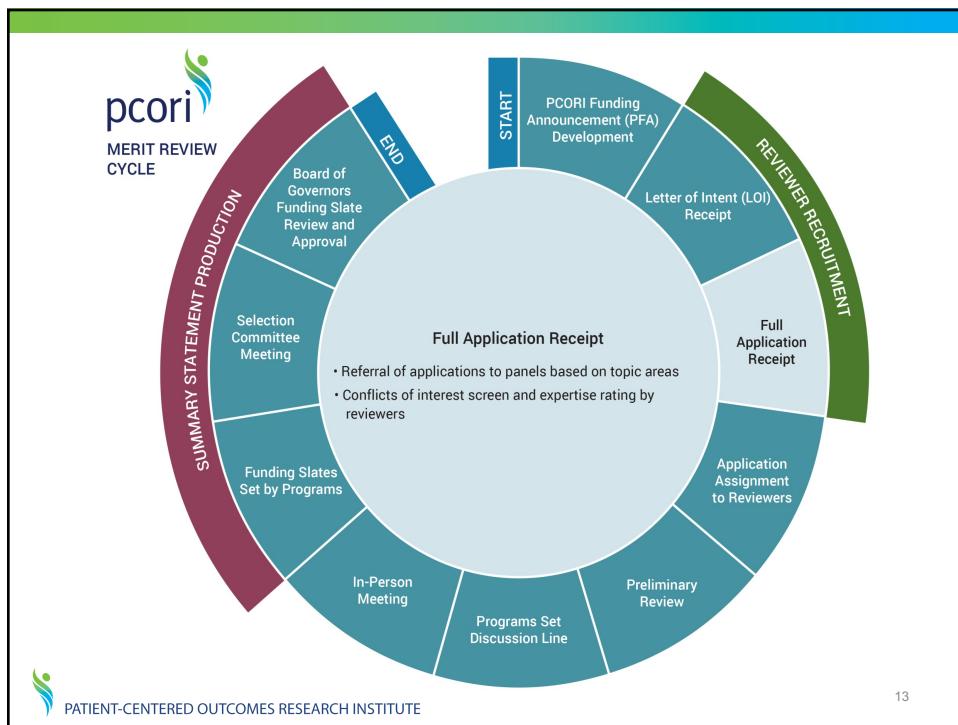
## Recruiting Reviewers

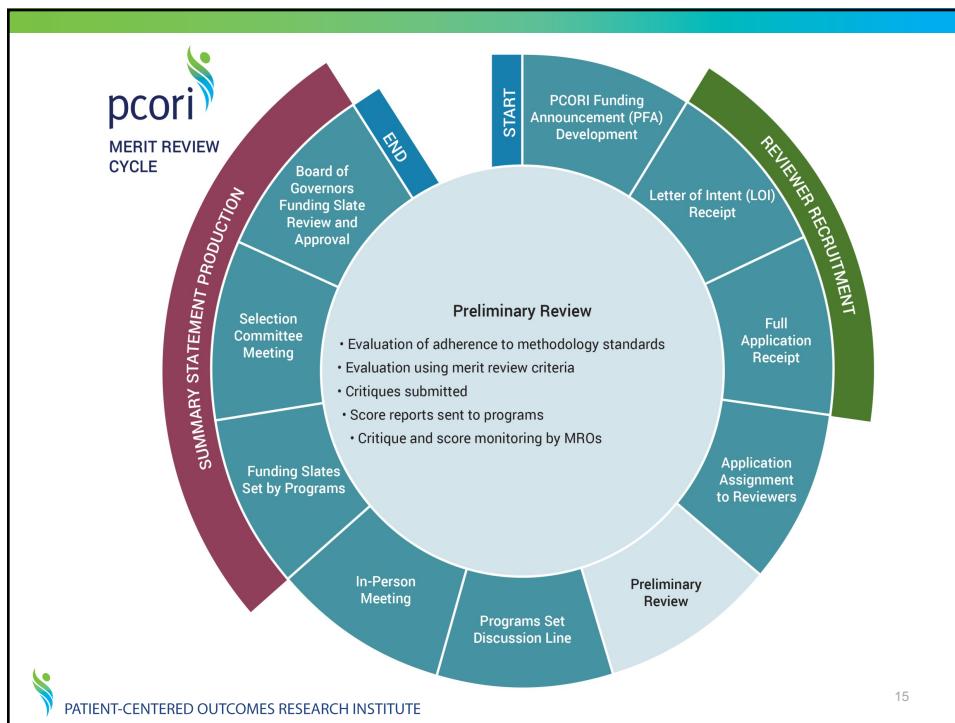
- Targeted recruitment of reviewers and panel Chair based on topic areas of accepted LOIs
- Competitive LOI process allows more time for thoughtful recruitment of reviewers
- Reviewers invited based on expertise/perspective



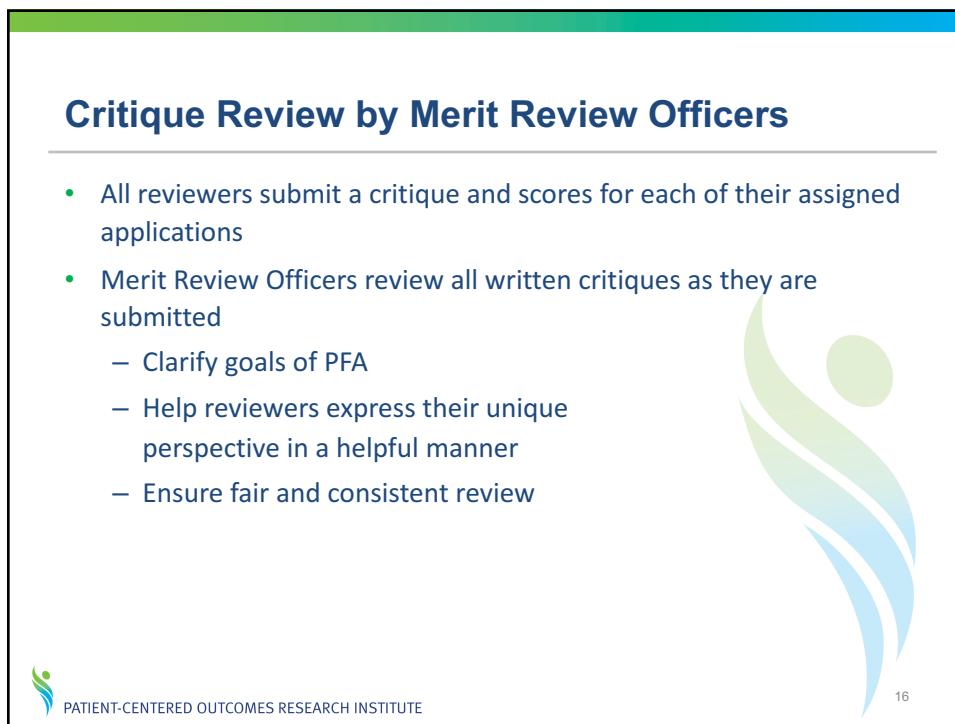
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## Merit Review Criteria

- Vary depending on PFA
  - Broad PFA (5 national priority areas) and Targeted PFAs
  - Pragmatic Clinical Studies
  - Dissemination and Implementation
- Reviewers address bulleted questions under each criterion



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## Reviewer Critique Template

### Criterion 1. Potential for the study to fill critical gaps in evidence

The proposal should address the following questions:

- Does the application convincingly describe clinical burden?
- Does the application identify a critical gap in current knowledge as noted in systematic reviews, guideline development efforts, or previous research prioritizations?
- Does the application identify a critical gap in current knowledge, evidenced by inconsistency in clinical practice and decision making?
- Would research findings from the study have the potential to fill these evidence gaps?

#### Strengths:

- - 
  -
- 

#### Weaknesses:

- - 
  -
- 

1	2	3	4	5	6	7	8	9
Essentially no weaknesses	Only minor, very fixable weaknesses	A few minor weaknesses	Many minor weaknesses	Some strengths and at least one moderate weakness	Some strengths and several moderate weaknesses	A few strengths and at least one major weakness	Very few strengths and a few major weaknesses	Essentially no strengths and many major weaknesses



Criterion 1 Score:

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## Reviewers evaluate Patient-Centeredness and Patient and Other Stakeholder Engagement

### Patient-Centeredness

- Does the project aim to answer questions or examine outcomes that matter to patients within the context of patient preferences?
- Research questions and outcomes should reflect what is important to patients and caregivers

### Patient and Other Stakeholder Engagement

- Patients are partners in research, not just “subjects”
- Active and meaningful engagement between scientists, patients, and other stakeholders
- Community, patient, and caregiver involvement already in existence or a well-thought out plan throughout the project



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## Additional Considerations

Adherence to  
PCORI  
Methodology  
Standards

Human  
Subjects  
Protections



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**Weighing Strengths and Weaknesses (example from Broad PFAs)**

<b>Major Strength:</b> An attribute that is likely to lead to improvements in healthcare and/or outcomes	<b>Major Weakness:</b> A weakness that would seriously limit the impact of the study's results on healthcare and/or outcomes
<b>Moderate Strength:</b> An attribute that would probably lead to improvements in healthcare and/or outcomes	<b>Moderate Weakness:</b> A weakness that would lessen the impact of the study's results on healthcare and/or outcomes
<b>Minor Strength:</b> An attribute that could lead to improvements in healthcare and/or outcomes	<b>Minor Weakness:</b> An easily addressable weakness that does not substantially lessen the impact of the study's results on healthcare and/or outcomes

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**Scoring Range**

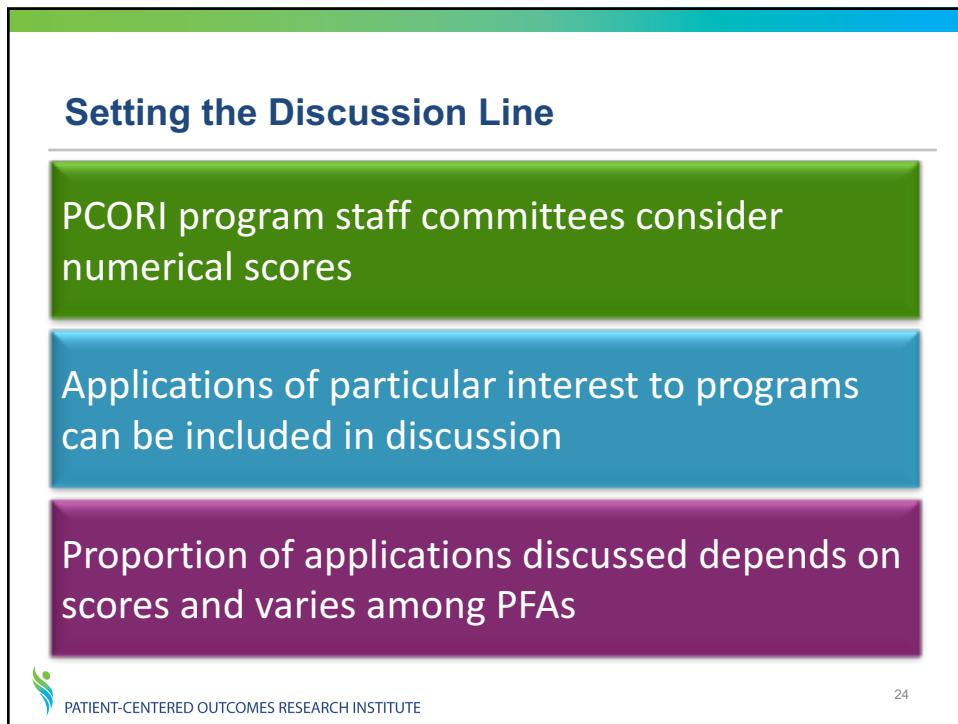
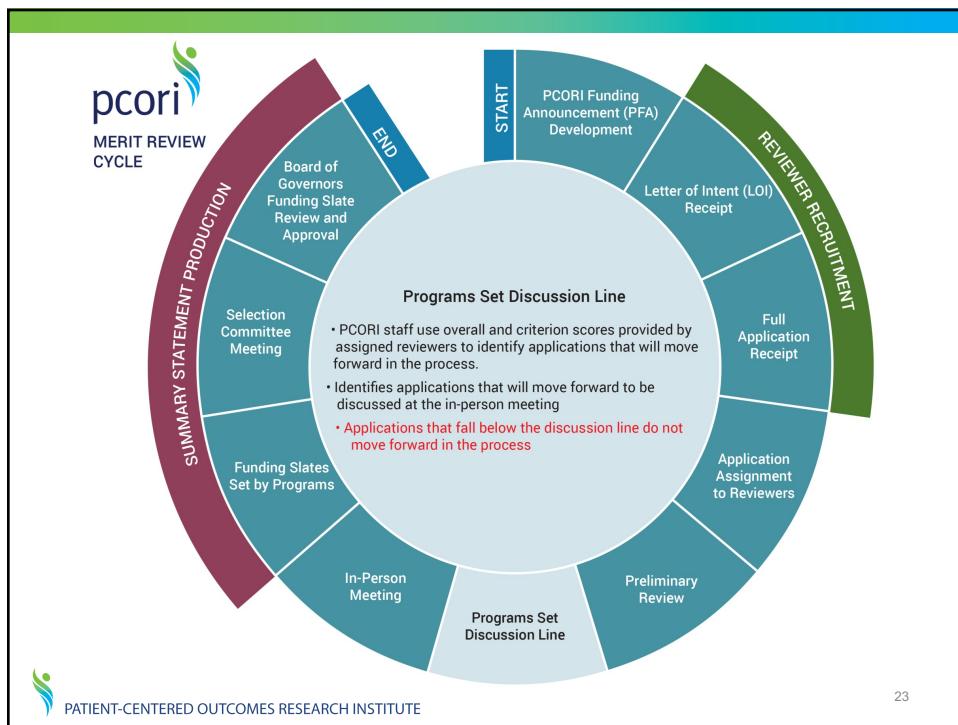
1	2	3	4	5	6	7	8	9
Outstanding	Excellent	Very Good	Good	Satisfactory	Mediocre	Unsatisfactory	Weak	Poor

Indicates an exceptionally strong application

Indicates an application with serious and substantive weaknesses

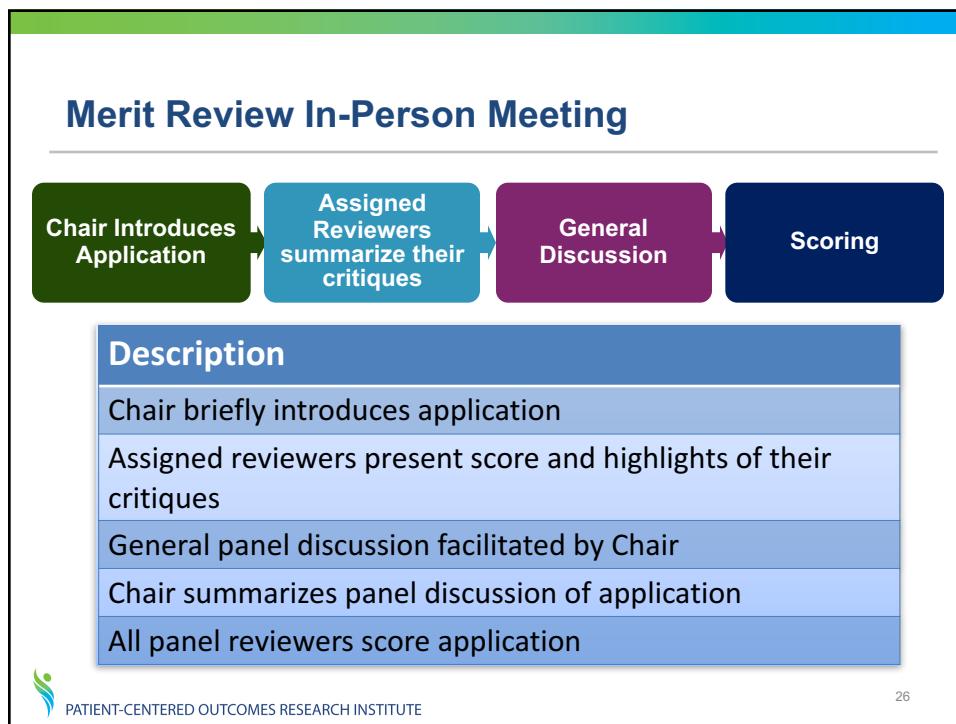
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## Discussion Components

**How each application addresses**

- The Merit Review criteria
- Programmatic goals as defined in the PFA

**Emphasis on importance of rigorous science**

- Methodological rigor in a project leads to trustworthy, patient-centered information

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## Summary Statements

- All applicants receive a summary statement at the end of the review cycle.

**If the application is discussed, summary statement includes:**

- Preliminary reviewer critiques
- Notes from application discussion
- Final panel average overall score and quartile

**If the application is not discussed, summary statement includes:**

- Preliminary reviewer critiques



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## Strategies for Preparing a Successful Funding Application



Pay attention to the merit review criteria



Explain your research to reviewers who are not all subject matter experts



Be clear on what is to be gained if your study is funded



Explain how your study meets an evidence-based need voiced by patients



All of the guidance provided to reviewers is available at PCORI.org under [Reviewer Resources](#).



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## Reviewer Resources

To apply to become a PCORI reviewer, visit:  
<https://pcori.force.com/engagement/CommunitiesSelfReg>

To view guidance to reviewers, visit:

<http://www.pcori.org/funding-opportunities/merit-review-process/merit-reviewer-resources>



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## Questions?

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**Thank You!**

**Mari Kimura, PhD**  
Merit Review Officer

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