

PCORI Merit Review Demystified


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Merit Review Officer

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pcori
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Welcome!



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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?



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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 and promotes a culture of mutual respect and understanding among reviewer types



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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

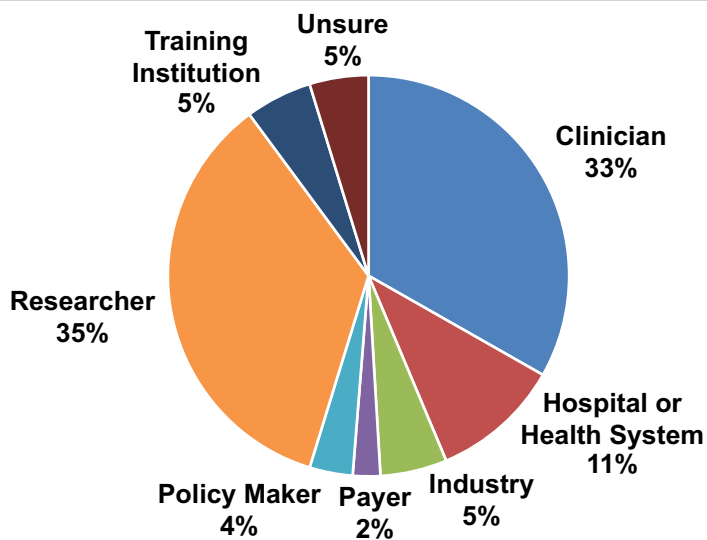
- Stakeholders
 - Contribute a unique healthcare system perspective
- Patients
 - Patient advocates
 - Caregivers
- Excluded
 - Board of Governors
 - Selection Committee members
 - Applicants



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Diverse Stakeholder Roles in Reviewer Pool

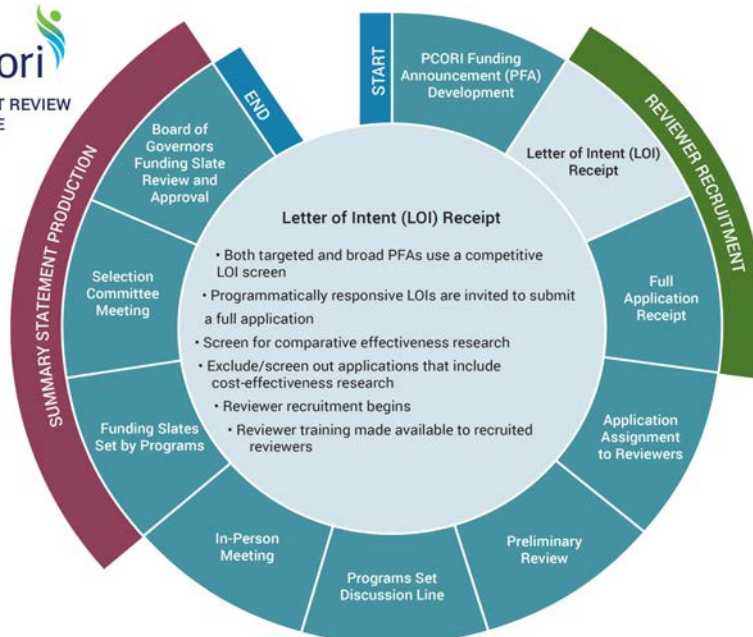


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MERIT REVIEW CYCLE



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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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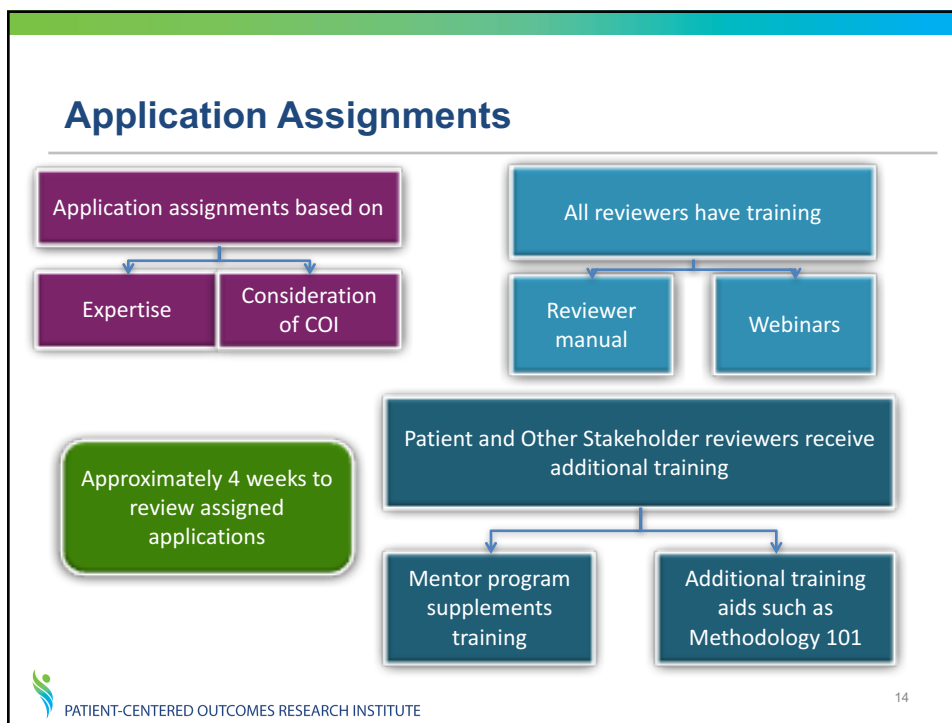
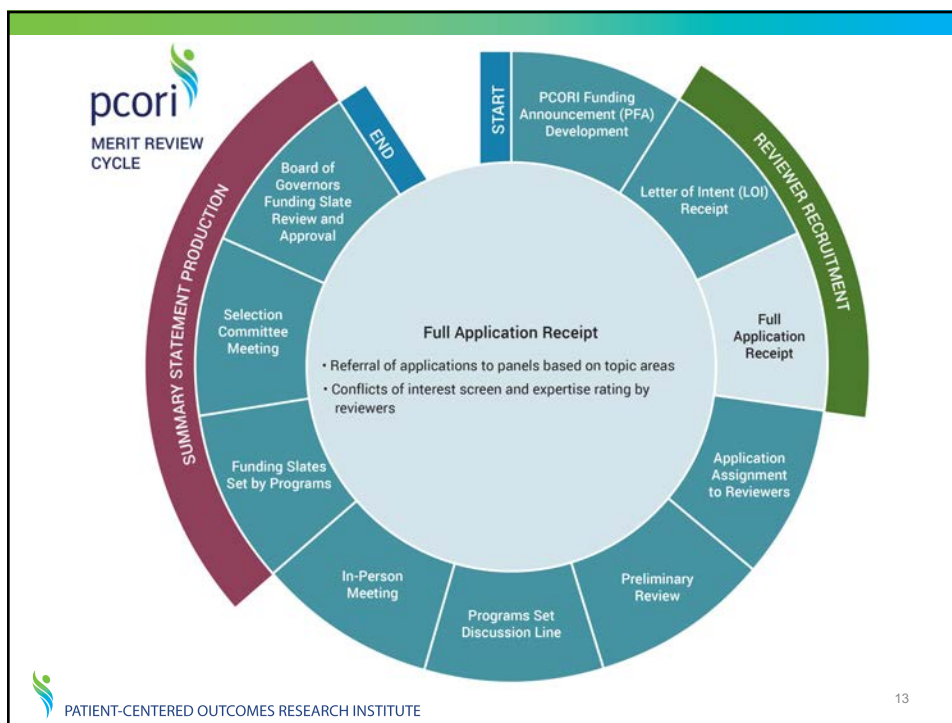
Recruiting Reviewers

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

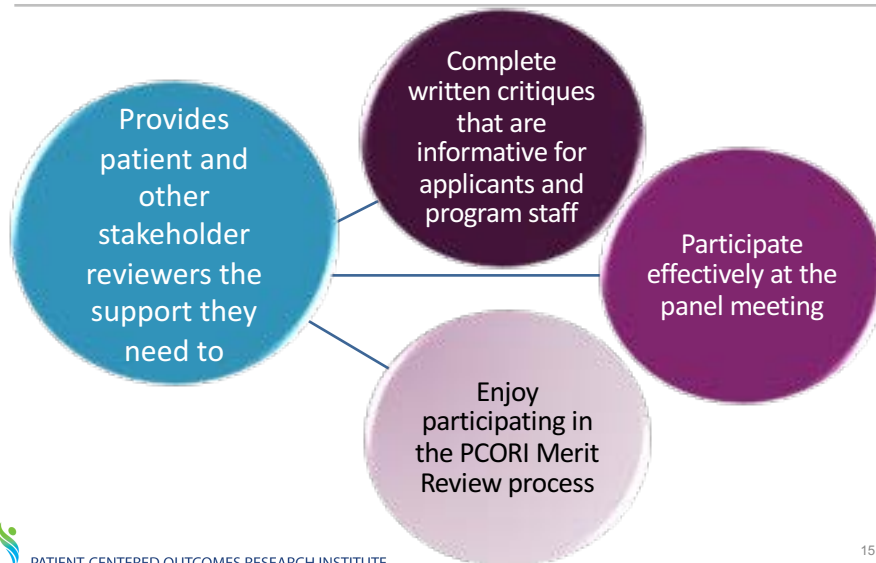


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Mentor Program

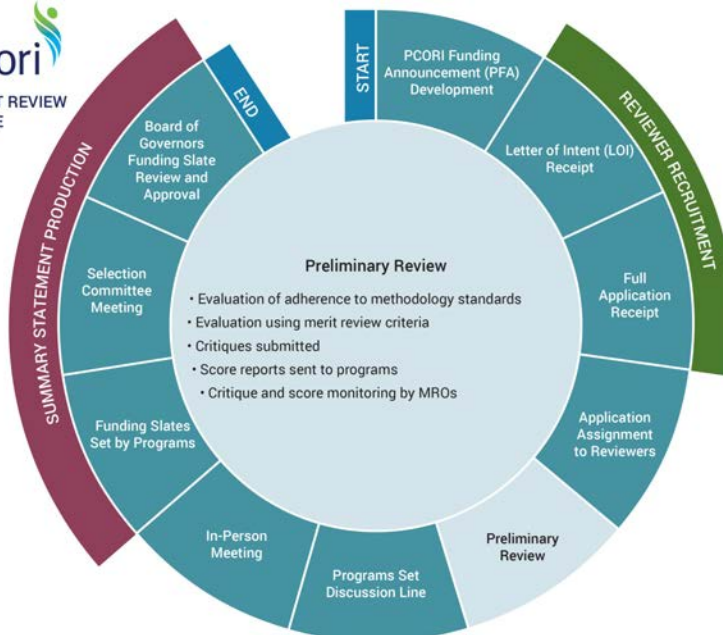


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MERIT REVIEW CYCLE



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Critique Review by Merit Review Officers

- All reviewers write a critique for each of their assigned applications and provide scores for their application
- Merit Review Officers review all written critiques as they are submitted on a rolling basis
 - Clarifies goals of PFA
 - Helps reviewers express their unique perspective in a helpful manner
 - Ensures fair and consistent review



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Merit Review Criteria

- Vary depending on PFA
 - Broad
 - Methods
 - Targeted
 - Dissemination and Implementation
- Reviewers address bulleted questions under each criterion



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We Require 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
Methodology
Standards**

**Human
Subjects
Protections**



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Offline 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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Weighing Strengths and Weaknesses (example from Broad PFAs)

Major Strength:

An attribute that is likely to lead to improvements in healthcare and/or outcomes

Moderate Strength:

An attribute that would probably lead to improvements in healthcare and/or outcomes

Minor Strength:

An attribute that could lead to improvements in healthcare and/or outcomes

Major Weakness:

A weakness that would seriously limit the impact of the study's results on healthcare and/or outcomes

Moderate Weakness:

A weakness that would lessen the impact of the study's results on healthcare and/or outcomes

Minor Weakness:

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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Setting the Discussion Line

PCORI program staff consider numerical scores

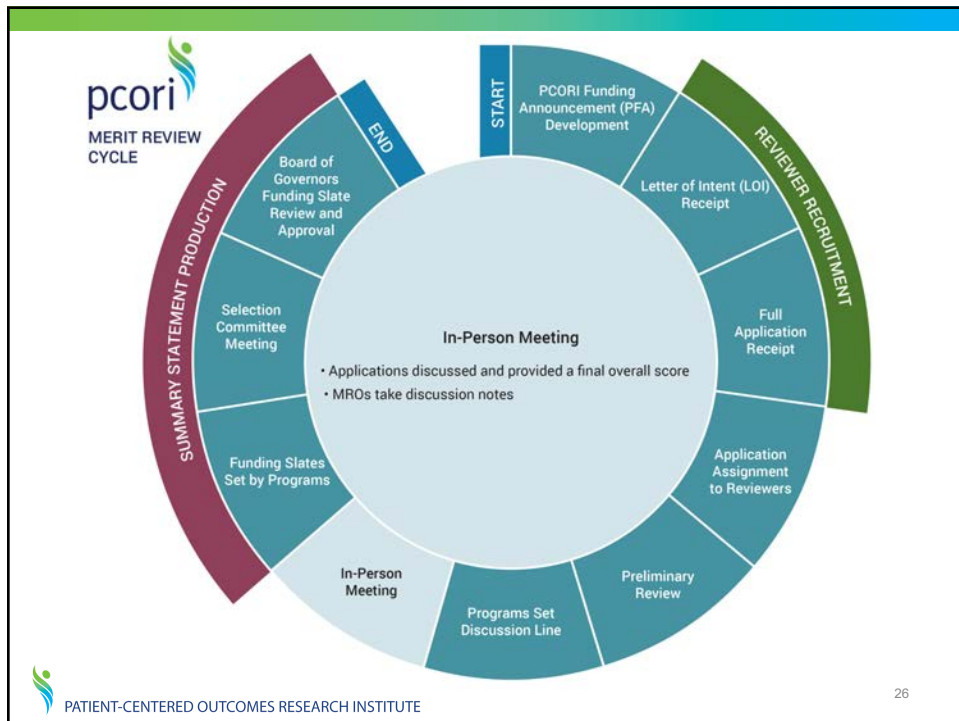
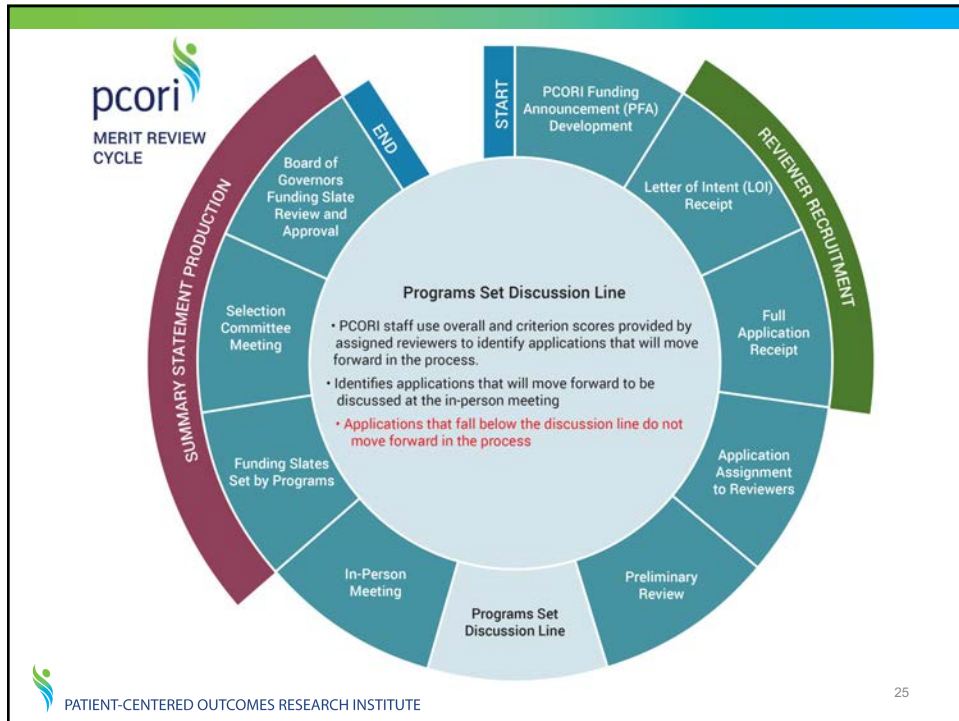
Applications of particular interest to programs can be included in discussion

Proportion of applications discussed depends on scores and varies among PFAs



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Merit Review In-Person Meeting

Chair Introduces
Application

Assigned
Reviewers
summarize their
critiques

General
Discussion

Scoring

Description

Chair briefly introduces application

Assigned reviewers present score and highlights of their critiques

General panel discussion facilitated by Chair

Chair summarizes panel discussion of application

All panel reviewers score application



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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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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 a need voiced by patients

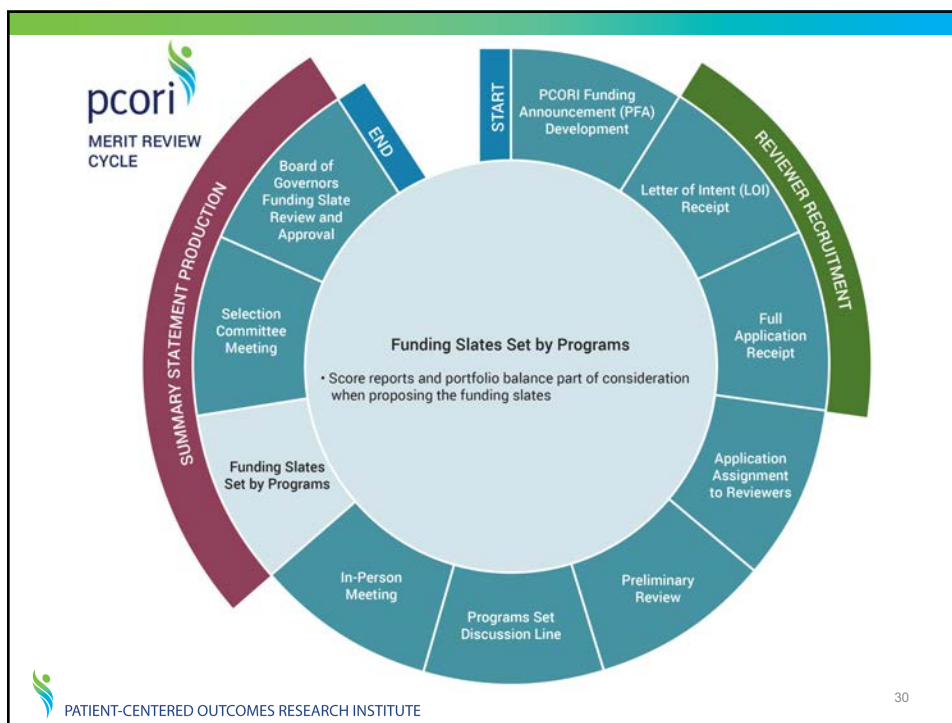


All of the guidance provided to reviewers is available at PCORI.org under **Reviewer Resources**.

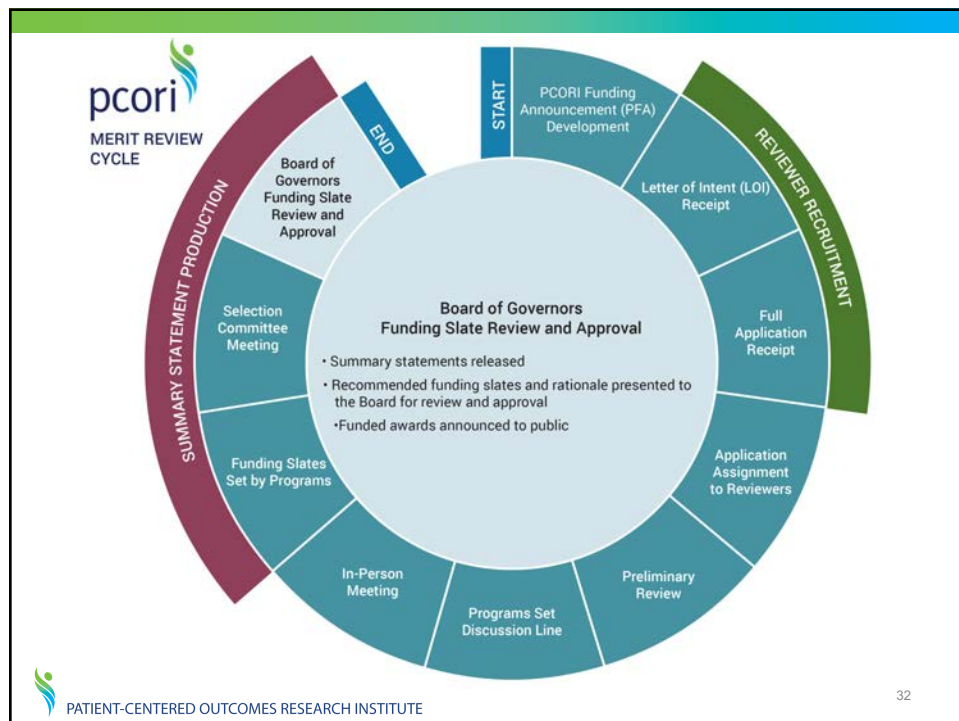


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Summary Statements

- 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

If the application is not discussed, summary statement includes:

- Preliminary reviewer critiques



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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!

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