Strategic Planning: Pulling It All Together

Joe V. Selby, MD, MPH
PCORI Board of Governors Meeting
Atlanta, GA
November 2013
"Plans are worthless, but planning is everything."

President Dwight D. Eisenhower
Recap - Evolution of PCORI’s Strategic Plan

- **July 2011**  Board Approves Mission Statement
- **May 2012**  Board Approves Vision Statement and Strategic Imperatives
- **Feb 2013**
  - Board Reviews and Discusses:
    - Strategic Framework and Logic Model
    - Metrics and Milestones
- **May 2013**
  - Board Reviews and Endorses Strategic Plan for Finalization
    - Discusses Implementation of Strategic Priorities in 2013
    - Discusses Metrics and Dashboard in Development
- **Sep 2013**  Board Reviews and Discusses 2013 Dashboard Highlights
- **Today**  Board Considers Full Strategic Plan (v. 2.0) for Approval
- **Ongoing**  Board Reassesses Plan Annually
**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

- **Substantially increase the quantity, quality, and timeliness of useful, trustworthy evidence available to support health decisions.**
- **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.**
Our Strategic Framework – Mission/Vision

IMPACT

Why We Do It
(Mission/Vision)

Better Informed Health Decisions

Improved Health Outcomes

Better Health Care
Our Strategic Framework – Goals

**GOALS**

What We Accomplish

- Increase Information
- Speed Implementation
- Influence Research

**IMPACT**

Why We Do It (Mission/Vision)

- Better Informed Health Decisions
- Better Health Care
- Improved Health Outcomes

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Board of Governors Meeting, November 2013
Our Strategic Framework – Strategic Imperatives

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<th>STRATEGIC IMPERATIVES</th>
<th>GOALS</th>
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<td>What We Accomplish</td>
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**STRATEGIC IMPERATIVES**

- Board of Governors Meeting, November 2013

**GOALS**

- Increase Information
- Speed Implementation
- Influence Research

**IMPACT**

- Better Informed Health Decisions
- Improved Health Outcomes
- Better Health Care

- Patient-Centered Outcomes Research Institute

Board of Governors Meeting, November 2013
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**

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<th>Strategic Priority: Develop and Fund Research Agenda with High Potential for Impact</th>
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<td>• Refine Topic Generation and Prioritization processes</td>
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<td>• Refine Merit Review process</td>
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<td>• Fund 3 cycles of research via broad PFAs</td>
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<td>• Launch funding for Targeted Topics</td>
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<th>Strategic Priority: Manage Research Portfolio Carefully to Maximize Success</th>
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<td>• Implement Portfolio Planning, Management, and Evaluation</td>
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<td>• Refine funding application and contracting processes</td>
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<th>Strategic Priority: Partner with Other Funders to Foster Patient-Centeredness in Research</th>
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<td><strong>2013 Activities</strong></td>
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<td>• Establish mechanisms for co-funding/co-sponsorship</td>
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Our Strategic Framework – Outputs Are Early Metrics

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<td>Engagement</td>
<td>Skilled Patient-Centered Outcomes Research Community</td>
<td>Increase Information</td>
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<td>Research</td>
<td>Portfolio of Patient-Centered Outcomes Research Studies</td>
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**STRATEGIC PRIORITIES**

**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 PCOR’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

**OUTPUTS**

**Skilled Patient-Centered Outcomes Research Community**

**Patient-Centered Outcomes Research Methods**

**Portfolio of Patient-Centered Outcomes Research Studies**

**Patient-Centered Research Networks**

**GOAL**
Substantially increase the quantity, quality, and timeliness of useful, trustworthy information available to support health decisions.
2014 RESEARCH ACTIVITIES

EXPECTED OUTPUTS

GOALS

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:
  o Research prioritization
  o Merit review

Portfolio of PCOR Studies

• Agenda of high priority topics
• Portfolio of studies that are:
  o High impact
  o Useful
  o 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

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Patient-Centered Outcomes Research Institute
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
  - Rare Disease
  - Clinical Trials
- Charters For BOG Approval
  - 11/18
- Charter In Development
  - Communication & Dissemination

Employ Them to Identify High Priority Topics
- Assessing Options
- Addressing Disparities
- Improving Systems
- Communication & Dissemination
- Will not be active in 2013

Launch Targeted PFAs
- Launch – PFAs Issued
  - Severe Asthma For 12/17 Award
  - Falls w/ NIH Apps due 11/13
  - Fibroids w/AHRQ Apps due 12/16
- Topics in Development
  - Back Pain
  - Obesity
  - DCIS
  - Bipolar Disorder
  - Cardiovascular
  - Perinatal
  - Arthritis
  - Migraine
  - Transitions
  - Empowering Patients

Fund Research through Broad PFAs
- LOIs
- Applications
- Awards

Launch Patient-Centered Research Network
- Launch – Awarded
  - Coordinating Center
  - Harvard Consortium
  - For 12/17 Award
  - PPRNs 61 Applications Under Review
  - CDRNs 28 Applications Under Review

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

Our Goals:
- Increase Information
- Speed Implementation
- Influence Research

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
      - 2 in process – $275K
    - Dissemination Awards
      - 1 in process – $250K

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

Developed Dissemination Plan & Infrastructure w/ AHRQ
- Plan – in development
- RFP Released 8/30/13
- Due date now Q4 FY 2014

Stakeholder Engagement Survey Results – TBD

Funds Committed for External Research
- 2013 CYTD (Target=$355-425M)
  - PPRNs
    - 61 Applications
    - Under Review
    - $12M
  - CDRNs
    - 28 Applications
    - Under Review
    - $56M

Our 2013 Priority Activities

Funds Committed for External Research
- Total Since Beginning (CY 2012)
  - FUNDS COMMITTED FOR EXTERNAL RESEARCH
    - 199 Projects
    - $325M Funds
    - 147 Broad=$244M
    - 2 Targeted=$50M
    - 0 CDRN/PPRN=$0M
    - 124 Projects
    - $253M Funds
    - 122 Broad=$203M
    - 2 Targeted=$50M
    - 0 CDRN/PPRN=$0M

Legend
- On Track
- Off Track
- Needs Attention
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 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