Welcome & Introductions

Steve Clauser, PhD, MPA
Director, Improving Healthcare Systems
Chad Boult, MD, MPH, MPH, MBA
Today’s webinar is open to the public and is being recorded

Members of the public are invited to listen to this teleconference

There will be no public comment period in today’s meeting, but we always welcome feedback by email (info@pcori.org)

Visit www.pcori.org/events for more information
Panel Leadership

- Trent Haywood, MD, JD
  - IHS Advisory Panel Chair
- Doris Lotz, MD, MPH
  - IHS Advisory Panel Co-Chair
- Steve Clauser, PhD, MPA
  - Director, PCORI Improving Healthcare Systems program
- Chad Boult, MD, MPH, MBA
  - Former Director, PCORI Improving Healthcare Systems program
Advisory Panel Members

**Andrew Adams, BBA**  
MBA Candidate, The Wharton School of the University of Pennsylvania

**Leah Binder, MA, MGA**  
President & CEO, The Leapfrog Group

**Mary Blegen, RN, MA, PhD, FAAN**  
Adjunct Professor, College of Nursing, University of Colorado at Denver

**David Bruhn, PharmD, MBA**  
Health Outcomes Liaison, National Accounts, GlaxoSmithKline

**Daniel C. Cherkin, MS, PhD**  
Senior Scientific Investigator, Group Health Research Institute

**Alan B. Cohen, MS, ScD**  
Professor, Health Policy and Management, Boston University School of Management

**Elizabeth D. Cox, MD, PhD**  
Associate Professor, Departments of Pediatrics and Population Health Sciences, University of Wisconsin-Madison

**Susan Diaz, MPAS, PA-C**  
Physician Assistant, Liver Transplant, Mayo Clinic in Florida

**John A. Galdo, PharmD, BCPS**  
Clinical Pharmacy Educator, Barney’s Pharmacy

**Priscilla Huang, JD**  
Policy Director, Asian & Pacific Islander American Health Forum (APIAHF)

**Eve A. Kerr, MD, MPH**  
Director, Ann Arbor Center for Clinical Management Research, Professor of Internal Medicine, University of Michigan

**Joan Leon, BA**  
Health Consultant

**Tiffany Leung, MD, MPH**  
Postdoctoral Fellow in Medical Informatics, Center for Innovation to Implementation (Ci2i), VA Palo Alto Health Care System Center for Health Policy/Center for Primary Care & Outcomes Research (CHP/PCOR), Stanford University

**Annie Lewis-O’Connor, NP-BC, MPH, PhD**  
Founder and Director, Women’s CARE Clinic

**John Martin, MPH**  
Senior Director, Research Operations, Premier Inc.

**Lisa Rossignol, MA**  
Graduate Student, Health Communication, University of New Mexico

**Anne Sales, RN, PhD**  
Professor, School of Nursing, University of Michigan

**Jamie Sullivan, MPH**  
Director of Public Policy, COPD Foundation

**Leonard Weather Jr., MD, RPH**  
Director, Omni Fertility and Laser Institute
IHS Staff

- Lynn Disney, PhD, JD, MPH
  - Senior Program Officer
- Lauren Holuj, MHA
  - Program Associate
- Alex Hartzman, MPH, MPA
  - Program Associate
- Tomica Singleton
  - Senior Administrative Assistant
Agenda

- Overview of the IHS Portfolio and Research Direction (11:15 – 11:45 p.m.)
- Panel Feedback Regarding IHS Portfolio & Research Direction (11:45 – 12:30 p.m.)
- Re-Cap of Sept. 9th Webinar Meeting (12:30 – 1:00 p.m.)
- Break for Lunch (1:00 – 2:00 p.m.)
- Overview of Progress Made on Prioritized Topics (2:00 – 2:45 p.m.)
- Panel Feedback Regarding Progress Made on Prioritized Topics (2:45 – 3:00 p.m.)
- Review Potential Topics for Prioritization in April (3:00 – 3:30 p.m.)
- Break (3:30 – 3:45 p.m.)
- Charter Review and Panel Feedback Regarding Roles / Other Opportunities for Involvement (3:45 – 4:30 p.m.)
- Housekeeping Items / Open Discussion About Next Steps (4:30 – 4:50 p.m.)
- Final Remarks and Adjourn (4:50 – 5:00 p.m.)
- Reception in the Calonnade Room (5:30 – 6:30 p.m.)
- IHS Panel Dinner in the Potomac Room – 3rd Floor (6:30 – 8:00 p.m.)
Meeting Objectives

- Communicate status of the IHS portfolio and progress towards targeted funding made to date
- Gain input from Advisory Panelists on the portfolio and direction of the IHS program
- Establish consensus regarding roles, responsibilities, and involvement of this panel
- Lay the foundation for the next IHS Advisory Panel term
IHS Portfolio and Research Direction

Lynn Disney, PhD, JD, MPH
Senior Program Officer, Improving Healthcare Systems
Seek applications to study the comparative effectiveness of alternate features of healthcare systems designed to optimize the quality, access, outcomes, and/or efficiency of care for the patients they serve.

Seek studies that will provide information of value to patients, their caregivers and clinicians, as well as to healthcare leaders, regarding which features of systems lead to better patient-centered outcomes.
IHS Strategic Framework

Drivers of Change
Innovative Use of:
• Technology
• Personnel
• Incentives/Resources

Improve Practice
• Coordinated Care
• Patient Involvement
• Equity
• Access
• Quality

Improve Outcomes that Matter to Patients
• Health
• Functional Status
• Health-Related Quality of Life
• Symptoms
• Survival

PCORI funds research to develop an evidence base.
The evidence base influences patient, caregiver, clinician, administrator, payer, policy maker, and other key stakeholders’ decisions about care and care delivery.

Healthcare System Components might include hospitals, clinics, CBO’s, Payers, SNF’s, etc.
Tactics for developing the IHS Portfolio

- A mix of Broad and Targeted PFAs
- Collaborations with other funders
  - NIA, NICHD, NIMH, foundations, etc.
- Topic development with Advisory Panel
- Application selection with standing merit review panel
- Active portfolio management in active partnership with Engagement, SROs, PSROs, Contracts
Progress Toward Portfolio Goals

**Broad PFAs:**
- 41 Funded Research Contracts (4 Cycles)
  - 6, 13, 13, 9 projects funded in each respective cycle
- One Open Solicitation – Applications due 1/21/14

**Targeted Topics:**
- Preventing Injuries from Falls in the Elderly (with NIA)
  - Merit Review in February, 2014
- Transitional Care approved for targeted PFA
  - Release in February, 2014
- Patient-Empowering Care Management
  - Collaboration with the J.A. Hartford Foundation to develop a model in the next 18 months
  - Potential funding announcement under development for release in FY 2015
IHS Program Broad Portfolio: Cumulative Number of Funded Contracts

Added 9 New Projects

Cycle I: Added 13 New Projects
Cycle II: Added 13 New Projects
Cycle III: Added 9 New Projects
August 2013 Cycle: 41

Cycle I: 6
Cycle II: 19
Cycle III: 32
IHS Program Broad Portfolio: Health Topics Addressed

- Chronic conditions, 13
- Mental health, 7
- Non-condition specific (Transitions, access, etc.), 11
- End-of-Life / Hospice / Home Care, 4
- Reproductive Health, 1
- Cancer, 5

*Some projects fit in more than one category, but are not double counted (i.e. cancer / end-of-life)
IHS Program Broad Portfolio: Sample Size for Main Analysis

Number of Studies

Sample Size

0-100 101-1000 1001-5000 5001-10000 10001-20000 >20000

0 28 11 0 1 1
IHS Program Broad Portfolio: Priority Populations Included

*Studies may include more than one population type*
Please provide feedback regarding any perceived gaps, opportunities, specific topics, focus areas, etc.

Consider the following questions related to our programmatic goals:

- How can we improve the portfolio to fund meaningful research that will optimize the quality, outcomes, and/or efficiency of care for the patients they serve?
- How can we best produce impactful, scalable, timely information that will provide value to patients, their caregivers and clinicians, as well as to healthcare leaders, regarding which features of systems lead to better patient-centered outcomes?
Discussion
Re-Cap of Sept. 9th Webinar Meeting

Trent Haywood, MD, JD
Doris Lotz, MD, MPH
IHS staff provided an overview of the progress made on the five topics prioritized by the IHS Advisory Panel in April.

- Panelists had a brief discussion about the topics and provided response to progress made thus far. The prioritized topics are:
  1. Transitional Care
  2. Patient-Empowering Care Management
  3. Perinatal Care Management
  4. Models of Integration of Mental Health Care and Primary Care
  5. Features of Health Insurance Coverage

The meeting concluded with a discussion about additional roles for the Advisory Panel and Next Steps.
Feedback Provided by Advisory Panel Members During the September 9th Webinar Meeting

**Transitional Care**
- Noted the importance of examining the effect of the transitional care models on a wide variety of populations
- Expressed the importance of using a multimodal survey that accommodates people with different health literacy levels and different language needs
- Recommended that the study could focus on a subset of health conditions

**Patient-Empowering Care Management**
- Suggested that the workgroup explore patient-provided care management that would include patient navigators and peer support
- Recommended a focus on persons with disabilities
- Overall, great interest in the findings of the PCORI literature review and December 6th workgroup
Feedback Provided by Advisory Panel Members During the September 9th Webinar Meeting

**Perinatal Care Management**
- Reiterated this is a major issue for Medicaid
- Suggested a large study of a comprehensive approach
- Interest in the October 24th workgroup

**Integration of Mental Health Care and Primary Care**
- Interest in the findings of the PCORI literature review and December 13th workgroup

**Features of Health Insurance Coverage**
- Need more discussion on this topic. Suggestions included:
  - Comparison of approaches (i.e. utilization management vs. cost sharing)
  - Focusing on access and whether patients with insurance have access to needed resources
  - Frame around implementation of the Affordable Care Act / Medicaid Expansion and compare approaches to state exchanges
Additional Roles for the IHS Advisory Panel

Serve as beta testers for curriculum materials (i.e. training materials for awardees)

- Help PCORI review study progress, and provide expertise in areas such as survey research and instrument development
- Interest in collaborating with other PCORI Advisory Panels
LUNCH
1:00 PM – 2:00 PM (EST)
Overview of Progress Made on Prioritized Topics
Transitional Care

Lauren Holuj, MHA
Program Associate, Improving Healthcare Systems
Board of Governors approved development of a targeted PCORI Funding Announcement (tPFA)

- Soliciting applications for research to determine which transitional care service clusters are most effective in improving patient-centered outcomes – while reducing risk-adjusted 30-day readmission rates – in different at-risk subpopulations and in different healthcare contexts
- One three-year comprehensive study
- Allocating $10-15 million for the total costs of this initiative
- Slated to release the tPFA in February, 2014
Discussion
Patient-Empowering Care Management for Chronic Conditions

Alex Hartzman, MPH, MPA
Program Associate, Improving Healthcare Systems
Patient-Empowering Care Management

Progress since our last meeting

Multi-perspective workgroup convened 12/6/13

Four main themes emerged from the discussion:

- How to merge professional case management with patient empowerment?
- How to empower patients and caregivers?
- How to select patients who will benefit from patient-empowering care management?
- What outcomes to measure?

- J.A. Hartford Foundation collaboration underway – Launched
Discussion
Perinatal Care Management

Lauren Holuj, MHA
Program Associate, Improving Healthcare Systems
Multi-perspective workgroup co-sponsored by IHS and Addressing Disparities convened on 10/24/13

- Fund a large multi-level, multi-center study of models of comprehensive perinatal care spanning conception through the postpartum period for women at high risk for maternal-child health outcome disparities.
  - Specific focus on education, access, and support:
    - Risk Identification and Mitigation, Patient and Provider Education, Shared Decision Making, Composition of Care Team and use of Lay Providers, Care Coordination and Navigation, etc.

Considering a partnership with NICHD
Discussion
Integration of Mental Health Care and Primary Care

Alex Hartzman, MPH, MPA
Program Associate, Improving Healthcare Systems
Integration of Mental Health Care and Primary Care

Progress since our last meeting

- Multi-perspective workgroup convened 12/13/13
- Five key questions were identified during this meeting:
  - In a primary care setting, comparison of integrating of mental health care through technology, in-person methods, or care as usual.
  - In a primary care setting, comparing increased mental health training with a care team, only adding mental health staff, and care as usual.
  - Comparing mental health self-management programs to usual care for patients with comorbid mental and physical illness.
  - For patients with severe mental illness, comparing peer-led self-management support to clinician-led self-management support for improving health behaviors.
  - In a community mental health setting, comparing multidisciplinary teams (including primary care clinicians) to usual care for outcomes of patients with comorbid mental and medical conditions.
Discussion
Features of Health Insurance Coverage

Lynn Disney, PhD, JD, MPH
Senior Program Officer, Improving Healthcare Systems
We have not made any strides towards developing a targeted funding announcement related to this topic.

Aspects of this topic were discussed in workgroups for Patient-Empowering Care Management and Integration of Mental Health and Primary Care.

We would like to include this topic for reprioritization by this panel in April 2014.
Discussion
Panel Feedback: Progress made on Prioritized Topics

Moderated by:
Trent Haywood, MD, JD – Chair
Doris Lotz, MD, MPH – Co-Chair
Panel Feedback: Progress Since Last Meeting

Does anyone have issues, suggestions, concerns, words of support, etc. on the direction of the IHS targeted portfolio as it relates to the topics prioritized by this panel in April, 2013?

- Transitional Care
- Patient-Empowering Care Management
- Perinatal Care Management
- Integration of Mental Health Care and Primary Care
- Features of Health Insurance
Review Potential Topics for Prioritization in April 2014

Lynn Disney, PhD, JD, MPH
Senior Program Officer, Improving Healthcare Systems
Panel Feedback: Old Topics for April 2014 Prioritization

Panelists received a hand-out outlining the research questions / topics of interest.

- Six topics previously reviewed by the Advisory Panel will be reconsidered for prioritization in April 2014:
  1. Rural Health
  2. Medical Homes
  3. Non-Physician Medical Homes
  4. Health IT and Treatment Guidelines
  5. Accountable Care Organizations and PCOs
  6. Effect of Insurance Features
The following IHS-related topics were suggested by AHIP and NBGH.

- **Hospital Acquired Infections** – Assess the most effective interventions to prevent hospital acquired infections, especially for delivery and newborns
- **Imaging** – Assess whether the use of a computerized order entry system is effective at promoting adherence to clinical guidelines for high cost imaging
- **Medication Adherence** – Assess which elements of multi-component interventions work best to improve medication adherence
- **Communication** – Comparison of telephonic case management vs. block level health advocates in health outcomes of indigent populations

IHS is also reviewing topics submitted to the PCORI web site since January 2013 to add to the list of topics to be prioritized.
Discussion
BREAK
3:30 PM – 3:45 PM (EST)
Charter Review & Panel Feedback Regarding Roles / Other Opportunities for Involvement

Moderated by:
Trent Haywood, MD, JD – Chair
Doris Lotz, MD, MPH – Co-Chair
Members of the IHS Advisory Panel will:

- Advise and provide recommendations to PCORI’s Board, Methodology Committee, and staff to help plan, develop, implement, improve, and refine efforts toward meaningful patient-centered research.

- Identify and prioritize critical research questions for possible funding initiatives under PCORI’s IHS program; and

- Provide ongoing feedback and advice on evaluating and disseminating the research conducted under this program.

The IHS panel will:

- Identify and prioritize research topics;
- Provide feedback to PCORI on specific research questions and study designs;
- Review and comment periodically on PCORI’s research portfolio, including the identification of gaps in the portfolio and overall impact of portfolio;
- Provide input on possible refinements to PCORI’s research priorities; and
- Consider study findings and advise on targets and strategies for PCORI dissemination and implementation efforts.

Do you feel that we are neglecting any of the required functions / scope of work listed in the charter?
  ▪ If so, how can we improve?

Do you feel you are involved enough?
  ▪ If not, how would you like IHS to involve you more?

How else would you like to be involved?
  ▪ Continue to participate in workgroups
  ▪ Review targeted PCORI funding announcements
  ▪ Provide input on internal research
  ▪ Other ideas

Other questions regarding composition / structure, applications / selection, meetings, term, etc.?
Housekeeping Items / Open Discussion / Next Steps

Chad Boult, MD, MPH, MBA
Steve Clauser, PhD, MPA
Housekeeping Items / Open Discussion / Next Steps

- All of you will receive a finalized summary of this meeting.
  - Staff will incorporate your input into our work.

- This is the last meeting of this term of the IHS AP
  - Reappointment for all who sent acceptance via email
  - Application and selection process in progress for 1 individual who declined to renew

- Next meeting (first of the next term) will take place in April 2014
  - In-person meeting
  - Topic prioritization
  - Other requests?
Reception and Dinner

Reception with all Advisory Panels
- 5:30 – 6:30 pm in the Colonnade Room (Lobby Level)

Dinner with IHS Panel
- 6:30 – 8:00 pm in the Potomac Room (3rd Floor)
- Opportunity to “bond as a panel” and get to know IHS staff including the new Program Director, Steve Clauser.

Any questions or final remarks?
Adjourn

Thank you for your participation!