

# Measurement Matters Engagement Summit

## Meeting Notes

October 30, 2025, 11:00 – 1:00 pm CST

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## Attendance

Carrie Leach, Engaged Researcher; Kimberly Strain, Community Partner; Beth Bollinger, Engaged Researcher; Yuriy Bisyuk, Engaged Researcher; David Lounsbury, Engaged Researcher; Kristina Staley, Engagement Technical Advisor; Shoba Dawson, Engagement Technical Advisor; Dawn Richards, Engagement Technical Advisor; Kate Wilber, Engaged Researcher; Taylor Grant-Gates, Engaged Researcher; Marc Cohen, Principal Investigator; Erin McGaffigan, Co-Principal Investigator; Tam Nguyen, Quantitative Lead, Missy Destrampe, Project Manager; Alexa Fleet, Research Assistant; Dabin Hwang, Research Assistant; and Sophia Webber, Facilitator/Engagement Lead

## Welcome and Housekeeping

### Project Overview

Sophia opened the meeting by reviewing the agenda and the project timeline. She invited everyone to introduce themselves in the Zoom Chat. The project is currently in **Year 2** and moving from *Piloting* the PCOR-EM tool to *Analyzing* the collected data.

The Year 1 process included:

- Literature scan
- Consensus methods
- Focus groups
- Development of draft PCOR-EM items
- Cognitive Testing
- Refinement of the tool for pilot testing

In Year 2, we piloted the tool from February to June 2025. Sophia asked the group for permission to record the meeting. The recording is available for review by partners [here](#). We will not post the recording on the public website. This recording is not for broader dissemination.

### Project Resources

Sophia also reviewed the resources available to our partners to track our progress and to access our meeting materials. These include our:

- [Activity Reports Page](#)
- [MM Resource Center](#)
  - [Parking Lot](#)
  - [Analysis Office Hours Log](#)
  - [Summit Meeting Materials](#)
  - [PCOR-EM Overview](#)
  - [Model 3 Removed and Remaining Items](#)

A partner shared that they always feel updated on what is going on in the project and where to find resources. Sophia encouraged group members to reach out to her if they feel out of the loop, can't find something, or simply want to connect to discuss the project.

## Progress Update

Marc shared an update on our pilot process and thanked everyone for helping to reach our goals.

- The pilot process reached 300 respondents
  - 266 of the responses passed our criteria to be considered ‘high quality,’ meaning it took them more than 5 minutes to complete the survey, and they passed the attention check items embedded throughout the survey
- We faced numerous challenges reaching respondents through our initial outreach activities
  - We had to pivot from our original plan to work with **PCORnet** due to administrative challenges building formal partnerships with Clinical Research Networks (CRNs) and a lack of integrated system between networks
  - PCORnet partners continued to play a role in assisting in outreach, particularly in connecting us to large-scale engaged studies and CRN advisory boards
- To ensure we met our goal, we updated our eligibility criteria to expand beyond PCORI-funded projects and conduct broader outreach
  - Working with broader partners allowed us to expand our reach to Clinical and Translational Research Institutes, Gerontological Society of America (GSA), NAPCRG Participatory Health Research Network, and through the many efforts of our partners connecting with their colleagues
  - We also conducted outreach with international partners and this outreach led to about 6% of our respondents
    - Our funder asked that international respondents not make up more than 20% of our respondents
- Reports detailing our pilot process and the challenges we faced are available on our [Activity Reports page](#)
  - [Pilot Phase Report: Data Collection](#)
  - [Pilot Phase Report: Addressing Fraudulent Survey Responses](#)

### What is PCORnet?

PCORnet is related to our funder, PCORI. According to their website: “PCORnet is a national resource that offers the kind of research ecosystem that has long been pursued: a fully integrated network where vast, highly representative health data, research expertise, and patient insights are built-in and accessible from the very start. The infrastructure of PCORnet is well established, meaning that PCORnet® Network Partners know how to maximize the value of these connections to deliver fast, trustworthy answers that advance public health.” ([PCORnet](#))

Many of our Pilot Partner Subcommittee Members are team members on projects included in PCORnet and helped us to navigate our relationship with the network.

# PCOR-EM Overview and Discussion

## PCOR-EM Overview

Sophia provided an overview of the Pilot version of PCOR-EM, which can be viewed [here](#).

- The PCOR-EM included 30 items (or questions)
- It uses Likert Scale answer options: Definitely yes, mostly yes, mostly no, and definitely no
- Items spanned the 7 domains identified in the Year 1 qualitative activities: Organizational Readiness, Time and Resources, Logistics and Meeting Techniques, Clear and Transparent Communication, Valuing Diversity, Trust and Relationship Building, Collaboration, Co-Learning, and Power Sharing

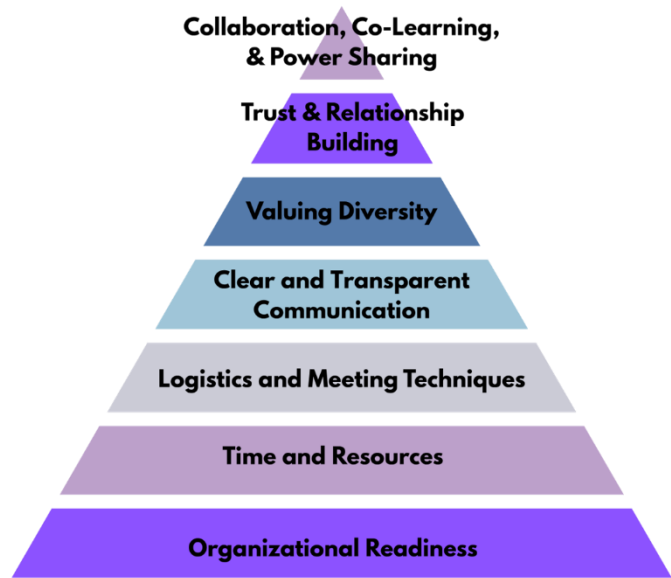


Figure 1: Seven Domains identified in Year 1

## PCOR-EM Goals

Sophia reminded the group about the goals of the tool and our analysis process to achieve those goals. We seek to:

- Create a reliable tool (each item is precise and there is precision across the tool)
- Create a valid tool (the tool measures what we want it to measure)
- Create a usable tool (a shorter tool respondents are likely to use)

Tam also explained that we seek to understand if engagement matters, what it looks like across a continuum, and whether ‘low’ or ‘high’ engagement corresponds to variations in research outcomes.

We are also seeking to create a tool in which the items are spread evenly across a range of difficulty, where some items represent elements of engagement that may be easier to accomplish well and others that are more difficult to accomplish well.

Finally, we want to create a tool in which items are spread relatively evenly across the 7 domains. Sophia and Erin clarified that the domains are not weighted, but an assumption about their ability to “stack” was baked into the model based on the qualitative data and discussions with partners, which indicated that in order to effectively do things like “value diversity” you may need to first achieve things around “clear and transparent communication.” These are assumptions that may also be challenged by our most recent findings.

## PCOR-EM Domains Discussion

The group discussed challenges with applying the domains and strategies for communicating them effectively.

- The group discussed the importance of accounting for context in our conceptualization of the engagement domains
  - Group members noted that many elements may be out of an engagement practitioner's control; however, if these elements still contribute to engagement, it is important the tool captures them
  - Some group members also pointed out that various contextual factors may make different elements more or less difficult. Item Response Theory allows us to continue assessing item difficulty across contexts. Additionally, we will continue to host qualitative discussions about the impact of context and whether or not the domains cover this concept of context effectively
  - A partner noted that the [social ecological model](#) may offer some insight into understanding and communicating the domains as this model accounts for personal, interpersonal, organizational, community, and policy factors
  - As a next step, the team will continue investigating these context questions in Office Hours analysis discussions and in planning for phase 2 funding
- A partner emphasized the importance of using a strength-based approach when presenting the domains and the tool generally, including framing “weaknesses” as opportunities rather than deficits
- The group offered additional models to consider in our interpretation and communication of the domains, such as [engagement capable environments](#)
  - Group members also provided examples of alternative ways to present the domains, such as a logic model, a fried egg visual, or this [circular model](#) from the First Nations Health Authority
- A partner highlighted the need to document our conceptual process throughout the project. We should document how we moved from the PAE Attention Framework to the 7 domains
  - The [activity reports](#) document how the 7 domains emerged from the PAE Attention Framework- this overlap can also be seen in the image below (not presented during the meeting)
  - The group noted that there is an opportunity to report about this conceptual growth and process during the dissemination phase

As next steps, the team will continue to engage partners in dissemination planning we can effectively communicate our process and findings, including exploring alternative models for presenting information, using strength-based communication, and documenting our conceptual process. Sophia will compile a [list of models shared by partners](#) for the Measurement Matters Resource Hub so that they can be easily integrated into further discussions.

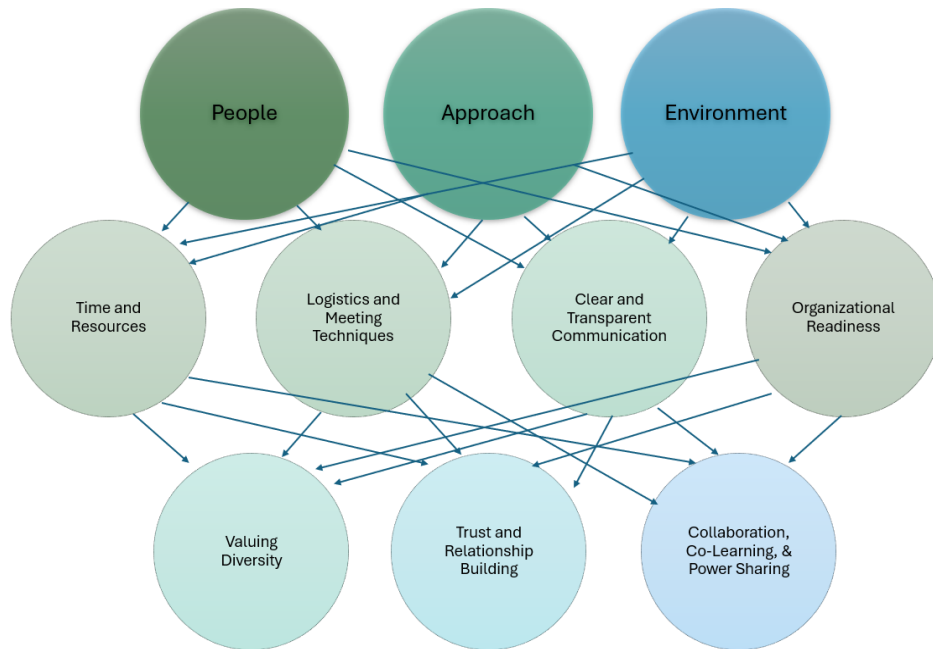


Figure 2: Image demonstrating the connections between the PAE Attention Framework at the foundation of our work and the seven operationalized domains that emerged during Year 1 qualitative activities

## Pilot Analysis Process

Tam provided an overview of our analysis process and thanked our partners for joining Analysis Office Hours meetings.

### What are Analysis Office Hours?

Analysis Office Hours are informal meetings where partners and research team members come together to workshop our analysis in real time. They are an optional way to engage in the ‘nitty gritty’ of our analysis decision-making and interpretation.

As of our October Summit Meeting, we have hosted 10 weekly meetings. Progress at these meetings is documented in the [Office Hours Log](#).

Meetings take place on Fridays from 12-1pm CST. All are welcome!

## Reviewing the Data and Checking Assumptions

Tam shared the initial steps taken to launch analysis:

- The research team identified that missing data was not an issue.
  - Missingness fell at about 1-2% (below the standard threshold of 5%)

- The research team conducted factor analysis and learned that the PCOR-EM is a tool that measures engagement as a unidimensional construct, meaning it is a single concept that our tool can measure. Learn more about unidimensionality [here](#).
  - **Factor analysis** is a statistical method that takes a large set of related variables and condenses them into a smaller number of hidden underlying factors. These hidden factors help explain how the original variables are connected and often make the data easier to understand and work with. Learn more here: [Factor Analysis and How It Simplifies Research Findings](#)

Additional details about this process can be found in the [Office Hours Log](#).

## Analyzing the Qualitative Data

Sophia also described the qualitative findings from the optional open-ended survey questions embedded throughout the pilot PCOR-EM. These open-ended questions provided an opportunity for respondents to share how the survey was working and provide additional context regarding their experiences. The research team qualitatively coded the open-ended responses using a software called Nvivo. The findings informed quantitative analysis steps, such as removing items that were confusing. This [Qualitative Finding Report](#) details the analysis process and finding. Sophia will upload the report to the Resource Hub and share it with all partners.

The qualitative data was organized into several different topics, including:

- Funding & Resources
- Item Clarity & Language
- Training & Capacity Building
- Response Options & Survey Design
- Diversity & Representation
- Accommodations & Accessibility
- Tokenism & Power Dynamics
- Contextual Factors

In their responses, respondents identified areas to improve the survey, such as unclear language or terms, concepts that may need elaboration or examples, and gaps and challenges with answer options.

## Item Response Theory (IRT)

Tam reviewed our process of model testing to ensure the reliability, validity, and generalizability of the IRT model that we ultimately used to draw conclusions. In Office Hours, the team explored three potential IRT models and sought to understand how our data fit these models. Each model provided different levels of precision, spread of difficulty, and coverage of domains. As shown in the figure below. Model 3 (the graded response model) provides the best precision and spread of difficulty. Its coverage of the domains is comparable to Model 2 and better than Model 1. Notes detailing our exploration of the models can be found in the [Office Hours Log](#).

Based upon these findings, the team decided to move forward with Model 3.










	Model 1	Model 2	Model 3
Response Category Groupings	<b>Yes</b> ---> Definitely yes, Mostly yes <b>No</b> ---> Mostly no, Definitely no	<b>Yes</b> ---> Definitely yes <b>No</b> ---> Mostly yes, Mostly no, Definitely no	<b>Definitely yes</b> <b>Mostly yes</b> <b>Mostly no</b> <b>Definitely no</b>
Number of items dropped	8 items	8 items	11 items
Precision			
Spread of Difficulty			
Coverage of Domains			

Figure 3: Table outlining the three models and their outcomes, as explored in Analysis Office Hours

## Findings to Date

### Item Removal

Tam noted that through Model 3, 11 items are removed from the PCOR-EM and 19 items remain. A document outlining removed and remaining items can be found [here](#).

Tam clarified that items are removed for the following reasons:

- They are not very precise
- They do not fit the model
- They overlap with other items

The IRT process requires we ‘remove’ items when these reasons arise; however, the items are not removed from the project. We will continuously review the removed items to understand what gaps may arise due to their removal and consider reasons they may have lacked precision.

Erin clarified that all items in the tool represent important elements of engagement. The IRT process helps us understand where some items may conceptually overlap with others, which allows us to remove those items and create a shorter, more usable, and more precise tool.

The group discussed potential challenges around removing items

- A partner identified that some removed items, such as Item 5, which considers compensation for engagement partners, represents an important and distinct concept not covered by other items
  - As a next step, the team should continue considering and documenting the potential conceptual gaps created by removal of the 11 items

- A partner noted that some of the removed items may have performed poorly due to the need for rewording
  - In future phases of tool development, we can explore rephrasing items to improve their performance and potentially fill conceptual gaps in the current model
  - The team clarified that we cannot rephrase items in the middle of the analysis process, but the removed items are available for future consideration after this phase of analysis
- The group identified the struggle between creating a precise tool and a short, usable tool (sometimes called parsimonious)
  - A partner clarified that our goal is not to create a checklist that captures all important engagement practices, but rather to create a short tool that can effectively differentiate between engagement done well and engagement done less well.

## Item Difficulty and Domain Coverage

Tam shared that the 19 remaining items demonstrate relatively good coverage across all 7 of the domains. They also provide relatively good coverage across the spread of difficulty, particularly from very easy to do to moderate. The 19 remaining items do not represent the most difficult things to accomplish well in engagement. Tam emphasized that the coverage we currently see is a good start. In future phases of tool development, we will seek to fill this coverage gap so that items in the tool span the entire spectrum of difficulty.

Partners provided important clarifying points and questions:

- One partner asked if we would consider using “branching” questions, which would allow respondents to move to items of varying difficulty based on their responses.
  - Tam clarified that given we do not have large enough item banks at the moment for this type of tool, but it may be a long-term goal of our funder, PCORI
- One partner noted that the tool makes assumptions about the difficulty of each item using IRT. The difficulty of each item may vary based on context.
  - For instance, sharing meeting notes may be very easy when partners have access to internet, email, and permanent addresses, but very challenging if your partners do not have this access.
  - As a next step, the team needs to continuously investigate the potential assumptions of the item difficulty. These assumptions may also be tested through future phases of tool development that reach a larger sample of respondents.

## Additional Considerations

Sophia highlighted considerations about the current tool that may impact future phases of tool development, including:

- Certain items may require clarification due to issues with understanding terms like “accommodations” and “new individuals”

- The team may rely on survey qualitative data and future cognitive testing to improve item clarity
- Funding is important to people’s experience with engagement, but is often out of their control
  - The team may rely on survey qualitative data, discussions with partners, and future qualitative activities to develop a deeper understanding of how the tool can capture these type of contextual issues
- The remaining 19 items do not specifically represent issues around accommodation, translation, or partner compensation
  - The team must continue to work with partners to identify such gaps and how they may impact the precision and difficulty of items within the tool

## Disseminating Findings Discussion

Throughout the Summit, the group identified crucial areas to inform dissemination. Sophia noted that we will continue engaging partners to plan for and implement the dissemination of our findings, including exploring co-authorship opportunities.

- The group discussed the importance using strengths-based language when communicating about the PCOR-EM . For instance, rather than frame low score on the PCOR-EM as “weaknesses” we can frame them as opportunities for improvement.
- Partners provided examples of alternative models, such as circular models, logic models, and fried egg visuals, that we may build upon when presenting our findings, such as the domains
- Partners identified areas to report on, such as:
  - Documenting our conceptual process, including how we moved from the PAE Attention Framework to the 7 domains
  - Documenting our engagement process, including our Analysis Office Hours

## Next Phase Discussions

Marc shared that PCORI invited our project to submit a full proposal for a second phase of Science of Engagement funding. The proposal is due mid-January. Should we be selected, this funding would allow for continued development of the tool, including refining and testing the tool with a larger sample size.

Sophia noted that there will be numerous ways to engage in a future project, should we receive funding. Sophia will share a survey with partners to gauge capacity to and interest in continued engagement with Measurement Matters.

Erin highlighted that the team reviewed feedback notes from all our Measurement Matters engagement meetings to inform our early proposal drafts. As we prepare to submit a full proposal, Sophia will organize meetings for all partners to discuss goals and strategies to inform the proposal writing.

The group highlighted potential priorities and strategies to explore in future phases of tool development:

- One partner noted that piloting the tool with a broader international audience may offer more contexts for testing the items
  - Erin clarified that our funder is typically strict about the percentage of international respondents we can seek out, but typically including international respondents as about 20% of our overall sample is okay
  - As a next step, the group should consider the advantages of specifically outreaching to international respondents and how to frame this strategy in our proposal
- One partner noted concern about how the tool will be independently validated
  - The team is currently relying on collaborative analysis using Item Response Theory to validate the tool.
  - The group should continue digging into this concern to ensure everyone clearly understands our current validation process and explore additional avenues for validation
  - As a next step, the group should consider how further validation may be baked into our proposal

## Next Steps

- Group members will fill out the post-meeting evaluation survey
- Sophia will draft Summit meeting notes and share them, along with the meeting recording, with all partners. The recording will not be uploaded to our public website and is not for broader dissemination.
- The team will review notes to ensure feedback about analysis informs office hour discussions
- The team will review Summit feedback to inform proposal development
- Sophia will schedule meetings to engage partners in phase 1 dissemination planning and phase 2 proposal development
- Sophia will share a survey to request partners' interest in engagement in phase 2