



# Measurement Matters Engagement Summit

## Meeting Notes

July 11, 2025, 12:00 – 2:00 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; Marc Cohen, Principal Investigator; Erin McGaffigan, Co-Principal Investigator; Tam Nguyen, Quantitative Lead, Missy Destrampe, Project Manager; Alexa Fleet, Research Assistant; Myrna Finn, 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. 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. Preliminary findings are detailed [below](#). Sophia asked the group for permission to record the meeting. The recording is available for review by invited 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 to date and to access our meeting materials. These include our:

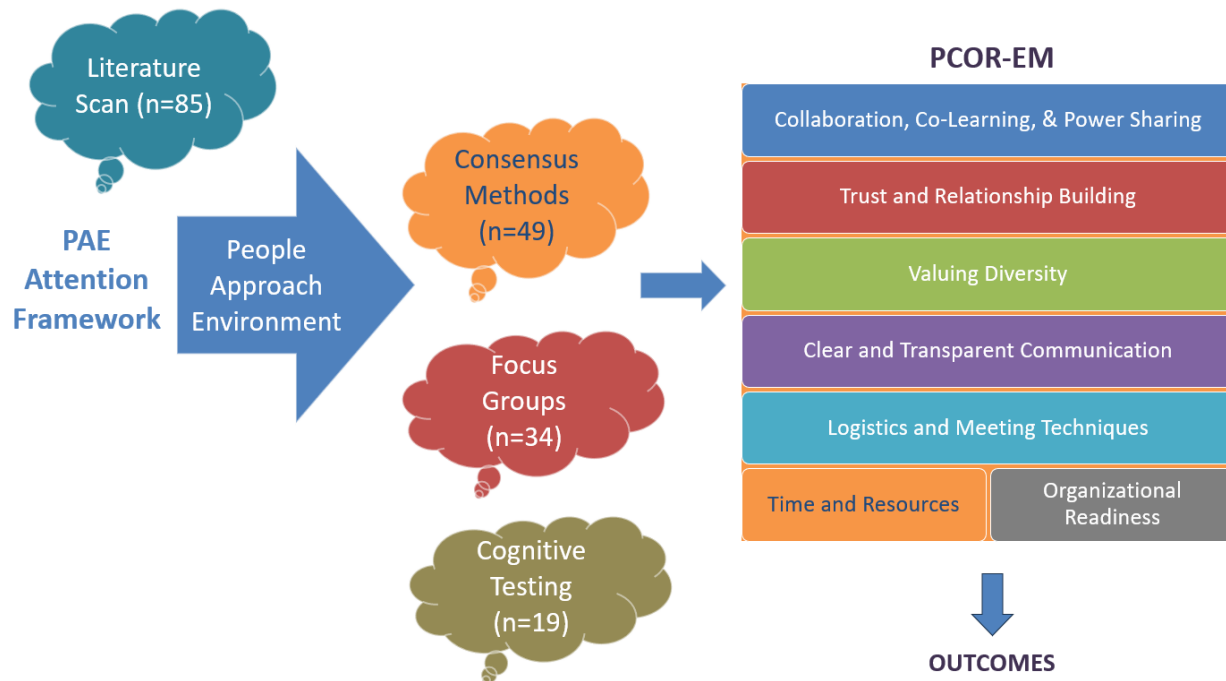
- [Activity Reports Page](#)
- [Cognitive Testing Snapshot](#)
- [MM Resource Center](#)

Sophia introduced a new engagement tool called the [Parking Lot](#) to capture feedback or ideas that require further discussion later in the project. The Parking Lot is optional and can be accessed [here](#) and via the MM Resource Center along with instructions for its use.

## Celebrating our Progress

The Engagement Summit was a full-group meeting, which included partners from our Steering Committee, Pilot Partner Subcommittee, and Engagement Technical Advisors. The purpose of the meeting was to connect partners, celebrate Year 1 milestones, and guide Year 2 work, particularly data analysis. Sophia highlighted partners' contributions across our multiple engagement structures, all of

whom played crucial roles in tackling our Year 1 activities and producing a draft PCOR-EM. Sophia also highlighted the activities and outcomes of year one, as pictured in the graphic below:



## Piloting the PCOR-EM tool

### Pilot Outreach

Sophia and Marc provided an overview of the pilot process, which launched in February 2025. We sought to reach 275-300 respondents who currently work on or recently completed an engaged research project. We collaborated with partners to broadly share the [survey package](#), which includes a screener, the PCOR-EM, and supplementary data collection questions. Survey respondents have the option to receive a \$35 USD gift card as a thank you for their participation.

Overtime, we updated our survey criteria to include potential participants outside the U.S. Missy clarified that our funder, Patient Centered Outcomes Research Institute (PCORI), suggests that international respondents make up less than 20% of our sample. At the time of the Summit meeting, international respondents made up only 6% of our sample, so we encouraged partners to continue sharing the survey with international colleagues.

### Pilot Process Results to Date

With the help of our partners, we reached **249 completed surveys** by the time of the Summit!

Partners also shared that they had received some positive feedback about the survey from those in their networks, including that the survey encouraged important reflection on their engagement process.

## Pilot Process Challenges

Marc explained that both fraudulent responses created significant challenges for our pilot process, prompting the implementation of stronger screening protections. These protections, which included separating the screener survey from the PCOR-EM and our manual review of screenings, increased the time and complexity of the survey process.

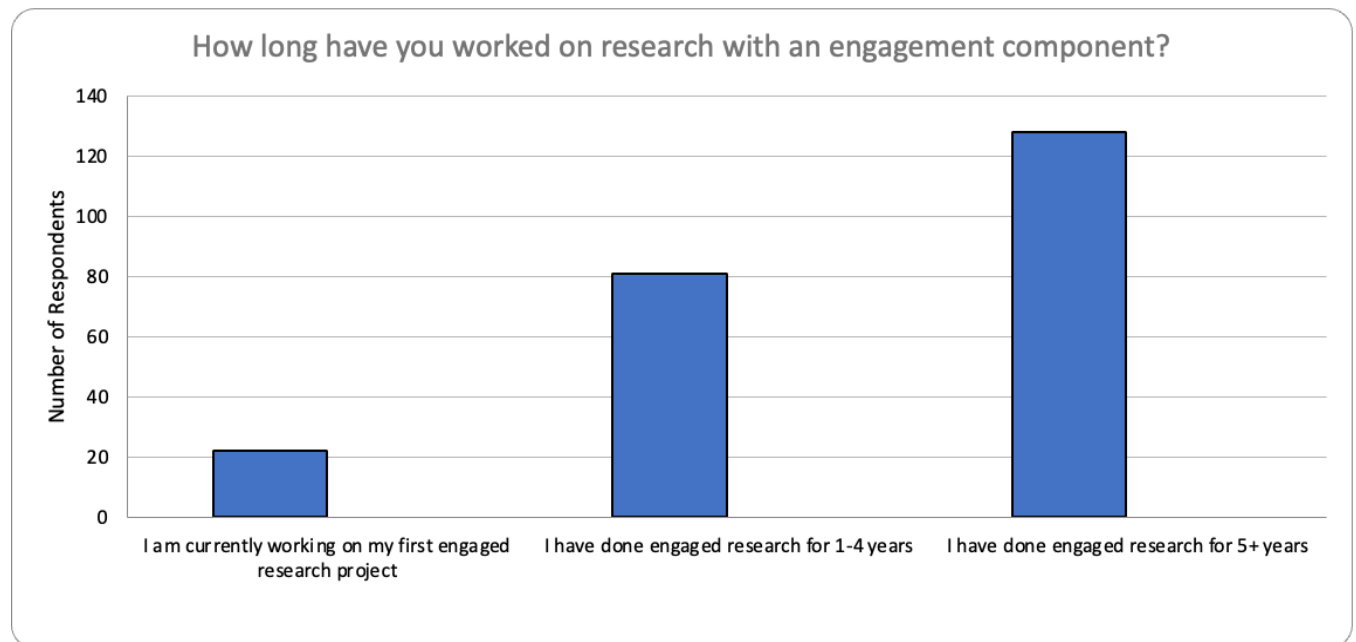
The team also found that our focus on PCORI-only projects hindered our outreach goals. While we initially required all respondents be PCORI-funded and worked directly with PCORnet to conduct outreach, we ultimately shifted to a broader outreach strategy and expanded eligibility beyond PCORI-funded projects. This has allowed us to grow our response numbers.

The group indicated interest in learning more about our Pilot Process lessons learned. Sophia will work with the study team to develop and share a deliverable outlining our lessons learned from navigating outreach challenges.

## Preliminary Analysis of Pilot Data

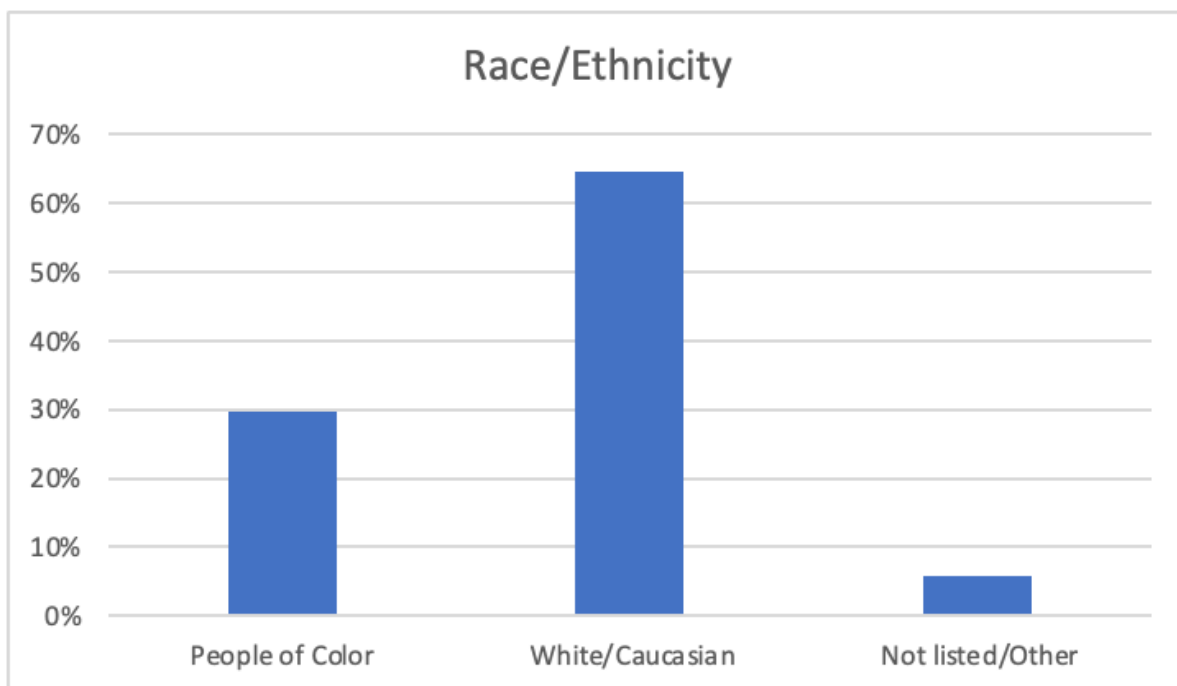
Tam shared preliminary analysis of respondent demographics, which guided a discussion on outreach strategies going forward. Additional graphs from this analysis are available in the [Summit slide deck](#).

Tam shared a graph outlining respondents' years of experience with research that includes an engagement component. Significantly more respondents indicated that they have done engaged research for 1-4 years (about 80 respondents) or for 5+ years (about 130 respondents) compared to the roughly 20 respondents that indicated that they were working on their first engaged research project. Tam highlighted the importance of reaching respondents with a range of experience with engagement and recommended we specifically outreach to potential respondents that fall into the "novice" category.



Tam shared graphs outlining the racial and ethnic identities of respondents, which show majority of respondents identify as white (about 65%), whereas about 30% identify as people of color and 5% did not list their racial/ethnic identity. Tam also showed a graph breaking out the specific racial and ethnic identities selected by respondents, which shows about 65% of respondents identified as white, 8-9% of respondents identified as Asian, roughly 8% as multiracial, and between 2-4% identified as American Indian or Alaska Native, Black or African American, and Hispanic and/or Latino, respectively. About 2% of respondents selected that their identity was not listed and about 4% preferred not to answer. No respondents identified as native Hawaiian or other pacific islander.

The group discussed how this representation within our respondents may be indicative of larger issues around a lack of diversity within the engaged research space. The group also agreed that it is essential we continue outreaching to reach respondents of diverse racial and ethnic identities, both within this round of outreach as well as in future pilot iterations.



## Tailoring Outreach to our Desired Audience

Partners provided suggestions for enhancing this round of outreach to reach more diverse and novice respondents. These suggestions were to:

- Prioritize simplicity in outreach materials
  - Simplify language around eligibility on the flyer and allow the screener process to flag folks who do not meet criteria.
  - Reduce confusing language around PCORI-funding requirements and older adult focus requirements.
- Call upon the specific demographics we need to reach
  - Be aware that those who have less experience with engagement may not feel confident responding to the survey.



- Use language such as “trainees,” “early-career researchers,” and “students” to reach respondents that are novice to this work

## Additional Outreach Recommendations

Partners agreed to share the survey within their networks, including reaching out to existing PhD student partners, professional networks, as well as posting on social platforms like LinkedIn. The group discussed the following outreach strategies to guide this push of the survey:

- Work with funders and academic partners to reach PhD students
- Contact community-based research programs, such as those located in schools and public health programs
- Reach out to [Society for Community Research and Action \(SCRA\)](#).
- Repost to Gerontological Society of America (GSA) interest groups, including the patient engagement, community engaged research (CEnR), and student groups

As a next step, Sophia will work with the team to update our flyers based on this feedback. Partners and study team members will share the materials broadly to reach our final outreach goals.

## Analysis Phase Overview and Discussion

Tam provided an overview of our analysis goals and process. Through this phase, we will seek to evaluate item reliability, a process which tells how well each of the items (survey questions) work. We will then assess the tool validity, a process which examines whether the tool measures what we seek to measure. Finally, our analysis may highlight gaps we seek to fill with future research. Details of the analysis phase are available in the [slide deck](#) as well as the [meeting recording](#).

## Exploring Differences Across Groups

Tam explained that during our analysis, we will investigate if items work the same for different groups. For instance, whether or not an item is reliable for respondents that identified as principal investigators as well as for those who identified as community partners. The group discussed additional group differences to explore, these include:

- Explore potential differences in item reliability across respondent demographics, such as respondent race, income levels, disability, language, education, and age
- Explore potential differences in item reliability across respondents’ research context. For instance, how items work for respondents that indicated their research focuses on underrepresented groups compared to respondents who did not.

Partners also underscored that no group is homogenous, and our analysis should not assume that respondents within a demographic category share the same needs, priorities, or experiences.

## Working Together to Test Assumptions

The group discussed the importance of using engagement opportunities to test the study team’s assumptions, which may impact analysis decisions. Partners also highlighted the following areas for further reflection and discussion:

- Interpretation of language used within the PCOR-EM
- Interpretation and usefulness of the REST tool (a validated tool for measuring outcomes which was included in our pilot package)
- The ability of the PCOR-EM to address unique engagement approaches that may be more commonly used when engaging underrepresented communities

## Experimenting with Answer Categories

The group explored the answer categories of the survey, which used a Likert scale. Potential answer options for each item include definitely yes, mostly yes, mostly no, and definitely no. The Study Team decided on the Likert approach as it provides more data to work with than simple “yes” and “no” answer categories. Once we enter analysis, we can consider “collapsing” these categories into yes and no. The group highlighted the importance of exploring patterns in the data before we decide if and how to collapse the categories. For instance, if answers generally split along two categories, it may be most efficient to collapse the categories along those lines. Alternatively, if answers vary along the scale, it is likely best to explore findings in the existing four categories.

Partners expressed interest in returning to this conversation as patterns emerge to discuss potential options for collapsing the categories as well as risks and potential misinterpretations within various answer categories.

## Exploring Item reliability

As we work through the analysis process, we will identify the reliability of each item within the tool. Ultimately, we may remove some of the items deemed unreliable. The group discussed the importance of engaging our partners during this process to discuss potentially unreliable items. Some items may be crucial, but unreliable due to a lack of clarity or other issues. Identifying these items can help us determine next steps for creating a well-rounded, reliable tool.

Some partners also underscored the importance of trusting our measurement techniques, sometimes referred to as psychometrics, to guide this process.

As a next step, Sophia will propose a potential engagement method to support partners’ involvement in the analysis process.

## Future Funding Directions

The group recognized that the current draft of the PCOR-EM represents a year’s worth of engagement and qualitative activities. In year 2 of the project, we will not have opportunities to directly edit the tool, rather we will focus on exploring and interpreting findings from our pilot phase. The groups discussed possible future funding opportunities to explore to continue improving the tool:

- Exploring how context impacts engagement processes and outcome
  - Consider building context-dependent questions
  - Consider piloting the tool in specific contexts
- Exploring how trust functions in the tool
  - Carrie, a Steering Committee Member, noted that she can connect the group with her colleague that specializes in team science and trust frameworks



- Collect more data on respondents' experience with engagement, such as asking about number of engaged projects they worked on

The group also discussed developing a paper on the ethics of measuring engagement. Dawn, a technical Advisor, noted that she is a guest editor for the Research Involvement & Engagement journal, which will have a special issue on ethics and patient engagement announced shortly.

## Envisioning What's Next

Sophia reviewed the upcoming windows of opportunity to inform change in the project, which are:

- July and August of 2025, when we are analyzing findings
- August and September of 2025, when we are interpreting findings
- October and November of 2025, when we are synthesizing and share findings
- November of 2025 through February of 2026, when we are seeking new ways to expand improvement and use of the PCOR-EM

The group discussed various ways to engage during this time, including attending one-on-one, small group, and large group meetings; joining Office Hours to workshop analysis, and reviewing documents and updates in between meetings to provide comments. Partners indicated significant interest in working directly on analysis and interpretation throughout the coming months.

## Next Steps

- Sophia update outreach materials to reflect the Summit discussion and share with all partners
- All partners and study team will share the flyer in a final outreach push
- Sophia will develop and share meeting notes
- Sophia will review the parking lot and track next steps
- Sophia will reach out to schedule Office Hours to engage partners in the analysis
- Sophia will reach out to schedule the next Engagement Summits
- Study team will explore the data to prepare for analysis
- Study team will draft pilot lessons learned and share with all partners
- Dawn will share information on the Research Involvement & Engagement journal special issue on ethics and patient engagement with the team