

Welcome Measurement Matters Partners!

March 2, 2026

12:30-2:30 pm CST





Meetings are recorded
for those who cannot
attend live.

Do we have your permission to record?

Agenda



1. Welcome & Housekeeping
2. Celebrating our Success
3. PCOR-EM Findings Discussion
4. Dissemination Discussion
5. Ways to Stay Engaged
6. Wrap Up

Project Timeline

Year 1



Literature Scan



Consensus Methods for Key Items



Focus Groups for Refining Items



Develop PCOR-EM



Cognitive Testing of PCOR-EM

Year 2



Piloting of PCOR-EM



Analyzing PCOR-EM Validity and Reliability

We are here!

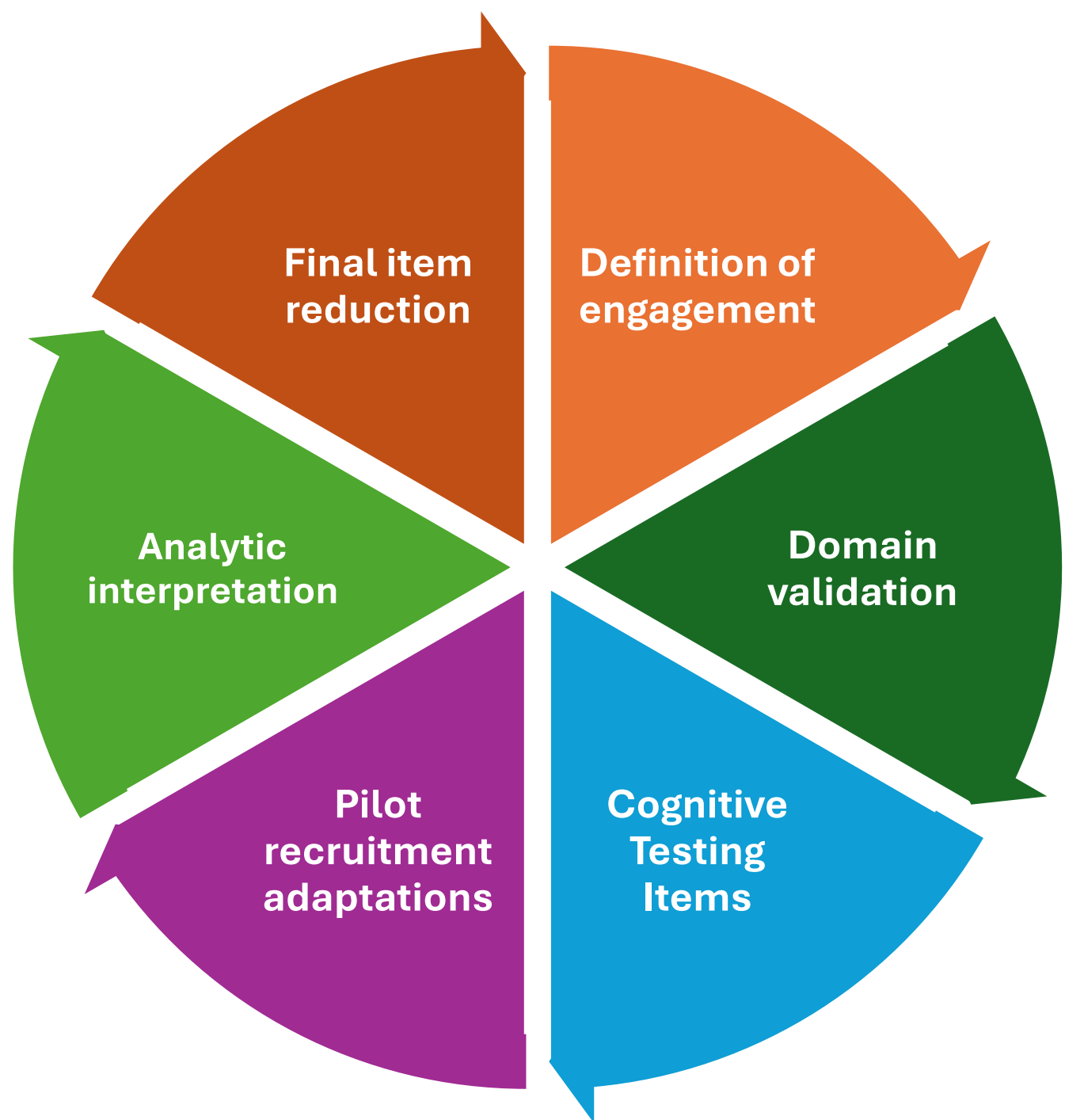


Reporting and Disseminating Findings

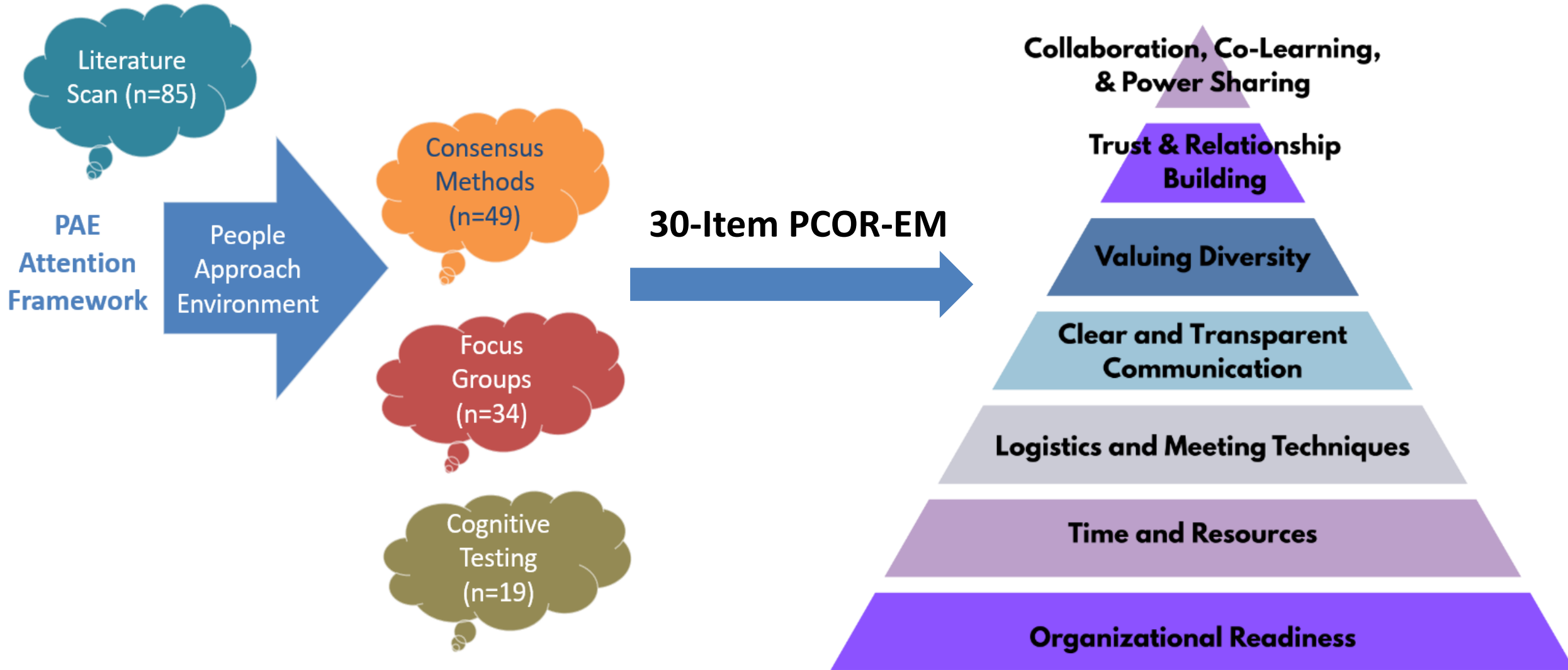


Celebration!

What Partners Shaped




Year 1: Developing the PCOR-EM



Year 1: Process Outcomes

- Launched Steering Committee and Technical Advisor Engagement
- Hosted ~16 engagement meetings
- Reached 102 engagement experts as participants in qualitative activities
- Refined an operational definition of engagement
- Prioritized engagement elements by importance and difficulty
- Identified and validated engagement domains
- Developed item bank and reduced bank from 89 to 30 items
- Developed the draft PCOR-EM!




Year 1 activity reports
available on the
Measurement Matters
Website!

Year 1: Key Learnings and Takeaways

- Engagement is complex, methods can vary widely by context
- Engagement terminology varies, we must account for varied experiences, confidence, and literacy
- Measurement should not be reduced to counts or checklists
- Meaningful engagement aligns with decision making windows and prioritizes power sharing
- Different lenses may prioritize different elements of engagement
- Many essential elements of engagement cannot be assessed by the researcher

Additional
takeaways,
challenges, or
insights?

- 
- Developed Pilot Package
 - Reached 300 respondents (exceeding our original target!)
 - Assessed data quality, removed responses that did not meet criteria
 - Conducted factor analysis
 - Tested for Differential Item Functioning
 - Assessed model fit
 - Calibrated items using best model
 - Conducted validity assessment

Year 2: Piloting and Analyzing the PCOR-EM

Further information available in [Analysis Office Hours Notes](#)

Year 2: Process Outcomes

1 Pilot Successfully Executed

- 879 screened
- 403 distributed
- 301 completed
- 266 high-quality retained

2 Strengthened Data Integrity

- Implemented verification protocols and fraud safeguards

3 Expanded Engagement and Recruitment Infrastructure

- Launched Pilot Subcommittee
- Broadened beyond PCORnet to national engaged research networks

4 Conducted Participatory Analysis

- Hosted Analysis Office Hours & Engagement Summits
- ~27 structured engagement meetings

5 Refined and Validated the Measure

- Reduced 30 → 19 items
- Confirmed essential unidimensionality
- Established preliminary validity

6 Clarified the Phase 2 Roadmap

- High-difficulty item development
- Subgroup testing
- Longitudinal validation

Year 2: Key Learnings and Takeaways

- Engagement activities work together and influence how the whole experience feels.
- Multi-mode communication, flexibility, and key personnel communication skills can make or break engagement
- Most projects are implementing foundational practices; higher-complexity practices occur less consistently.
- Measuring engagement is an ongoing, iterative process.
- Removing items for statistical reasons does not mean those practices are unimportant.
- We must monitor potential gaps as the measure is refined.
- The tool should be tested with a larger and more diverse group.
- The PCOR-EM can support both measurement and reflection for improvement.

Additional
takeaways,
challenges, or
insights?

Engagement Evaluation Results

Table 2. Aggregated Post-Meeting Evaluation Results (% of Respondents)

Survey Question	Steering Committee (n=15)	Subcommittee (n=7)	Engagement Summit (n=9)
I understood the purpose of today's meeting	100% Agree, 0% Disagree, 0% Unsure	100% Agree, 0% Disagree, 0% Unsure	88.9% Agree, 0% Disagree, 11.1% Unsure
I had the materials I needed to prepare for this meeting	86.7% Agree, 0% Disagree, 13.3% Unsure	85.7% Agree, 0% Disagree, 14.3% Unsure	100% Agree, 0% Disagree, 0% Unsure
I had the support and/or accommodations needed to fully participate	100% Agree, 0% Disagree, 0% Unsure	100% Agree, 0% Disagree, 0% Unsure	100% Agree, 0% Disagree, 0% Unsure
The meeting was well facilitated	93.3% Agree, 0% Disagree, 6.7% Unsure	100% Agree, 0% Disagree, 0% Unsure	100% Agree, 0% Disagree, 0% Unsure
I believe this meeting was a good use of my time	93.3% Agree, 0% Disagree, 6.7% Unsure	85.7% Agree, 0% Disagree, 14.3% Unsure	66.7% Agree, 0% Disagree, 33.3% Unsure
I was an active member of one or more of today's discussions	100% Agree, 0% Disagree, 0% Unsure	100% Agree, 0% Disagree, 0% Unsure	100% Agree, 0% Disagree, 0% Unsure

PCOR-EM Survey Findings



PCOR-EM Respondent Information



Target respondents

People conducting engagement including researchers, patient and community partners, engagement facilitators and coordinators

Age

- 49.8% were ages 18–44
- 40.4% were ages 45–64
- 8.3% were age 65 or older

Education

- 80.5% had a graduate degree or higher
- 14.7% had a bachelor's degree
- 4.5% had a high school, technical school, or some bachelor's education

PCOR-EM Respondent Information



Respondent's years of engagement experience:

- 52% had 5+ years of experience
- 48% had <5 years of experience

Respondent's Gender Identity

- 76.6% identified as women
- 19.2% identified as men
- 4.2% selected another option or preferred not to answer

Respondents Racial and Ethnic Identity

*Respondents could select more than 1 option

- 71.4% identified as White/ Caucasian
- 11.3% identified as Black or African American
- 10.2% identified as Asian
- 7.5% identified as Hispanic/Latino
- 3% identified as American Indian or Alaska Native

PCOR-EM Respondents' Roles in Engagement Projects

Question: Please select all the roles you have had in engaged research projects, including this one. (Select all that apply):

Answer Options: researcher, project coordinator, engagement coordinator, patient/community partner, meeting facilitator

- 36% of respondents have had 1 engagement role
- 25% of respondents have had 2 engagement roles
- 19% of respondents have had 3 engagement roles
- 15% of respondents have had 4 engagement roles
- 5% of respondents have had 5 engagement roles

*(n=264)

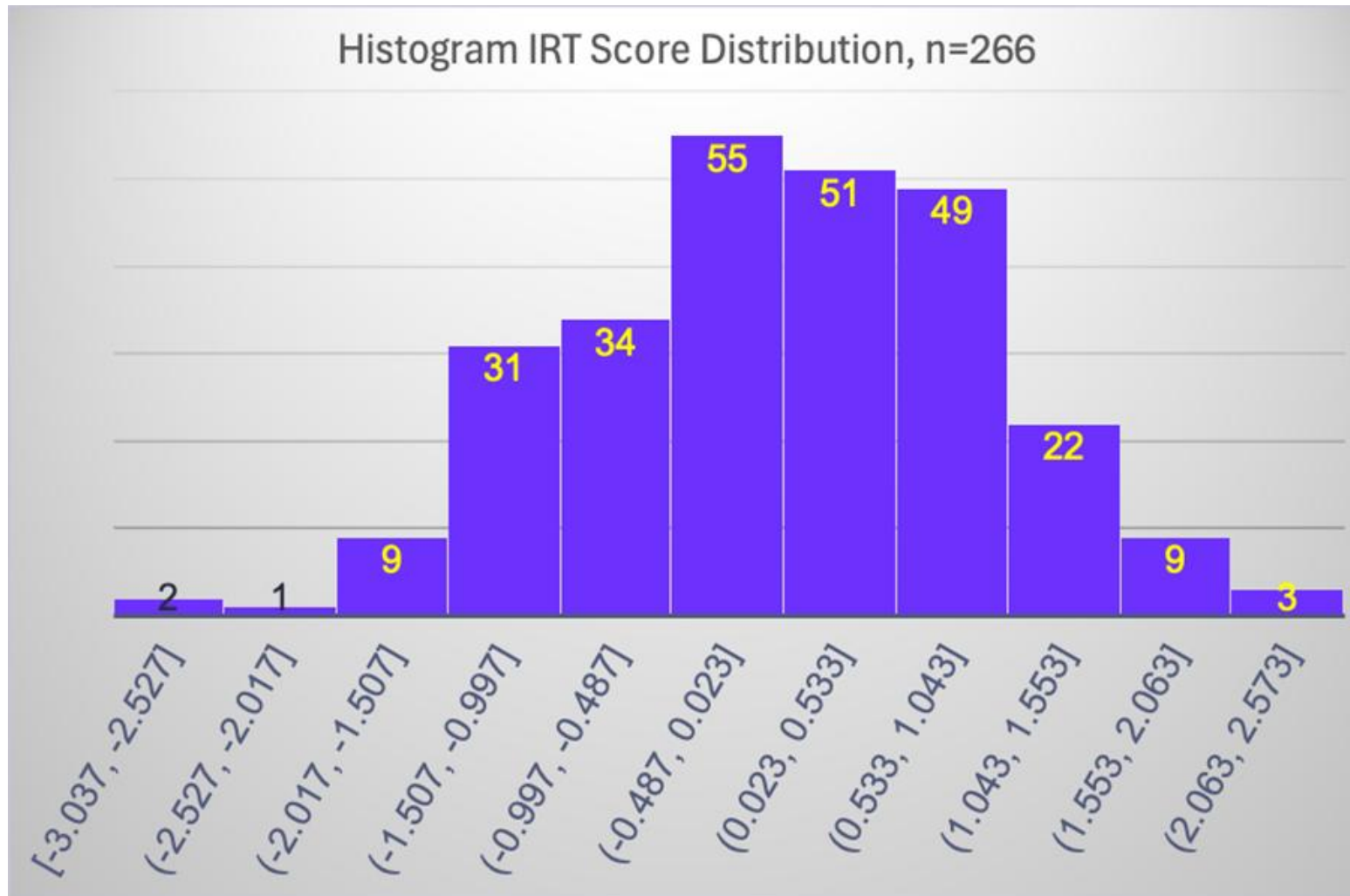
PCOR-EM Respondents' Populations of Major Focus

*Respondents could select more than 1 option

- 52% focus on Older adults
- 51% focus on Racial/ethnic minorities
- 29% focus on Persons with disabilities
- 19% focus on Persons with mental health conditions
- 39% focus on Persons with serious chronic conditions
- 31% focus on Low-income populations
- 14% focus on Immigrants
- 9% focus on Refugees
- 4% focus on Migrant Workers
- 5% focus on Persons experiencing homelessness
- 11% focus on LGBT+ individuals
- 26% focus on Other

(n=266)

PCOR-EM Score Distribution





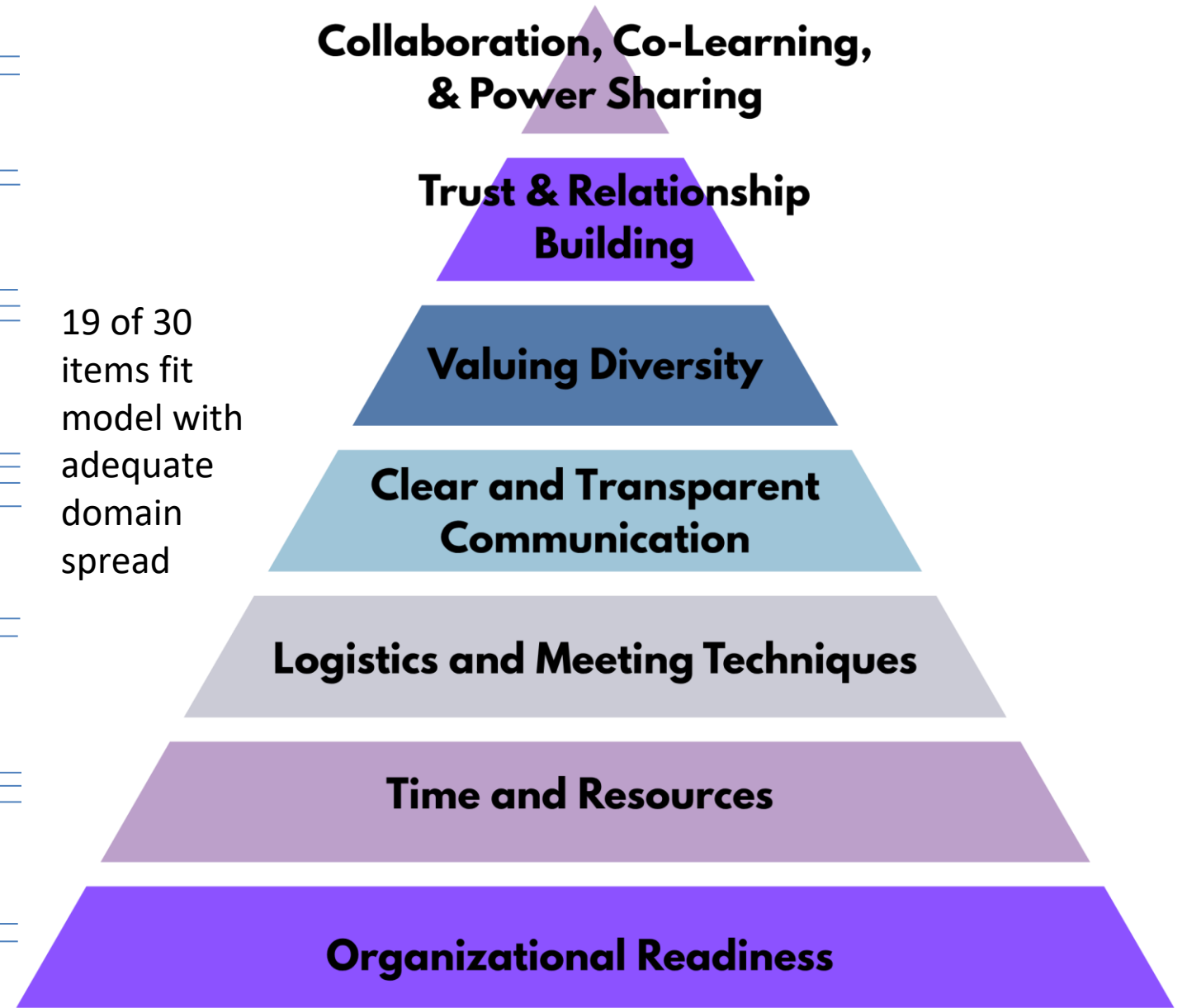
Let's Take a
Break

Validating the PCOR-EM & the REST Results



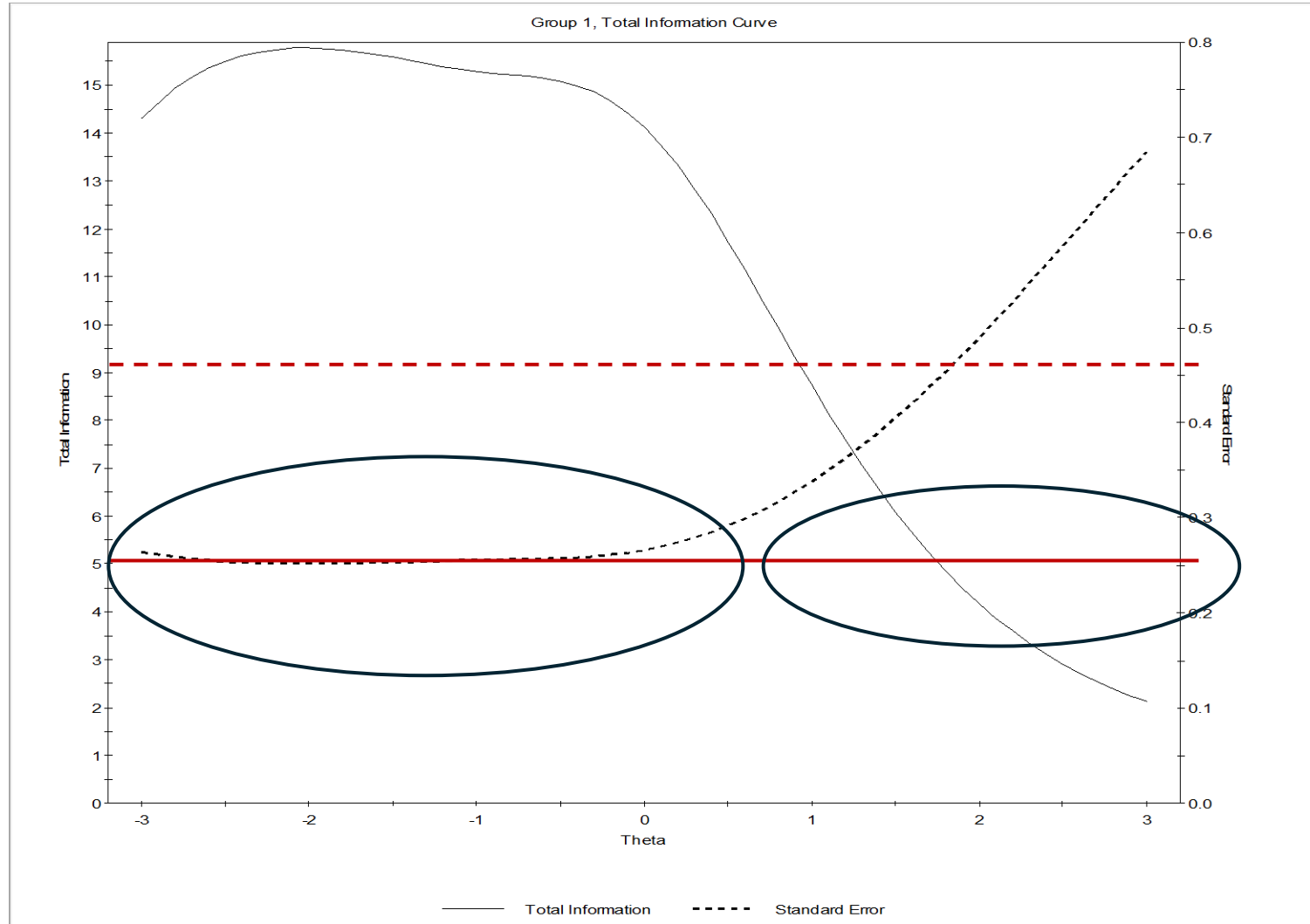
Validating the
PCOR-EM:
Selecting a
Model and
Removing Items

19 of 30
items fit
model with
adequate
domain
spread



Validating the Tool: Testing Precision

Model 3 Standard Error (Precision) Curve:



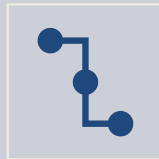
The tool measures low to moderate engagement most precisely.

Validating the PCOR-EM:

Testing the Relationship to Outcomes



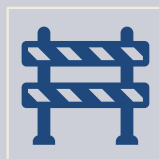
What is the REST? The Research Engagement Survey Tool (REST) is a validated outcomes measure. We attached a modified version to the end of our survey



Why does this matter? A relationship between REST scores and PCOR-EM scores demonstrates construct validity

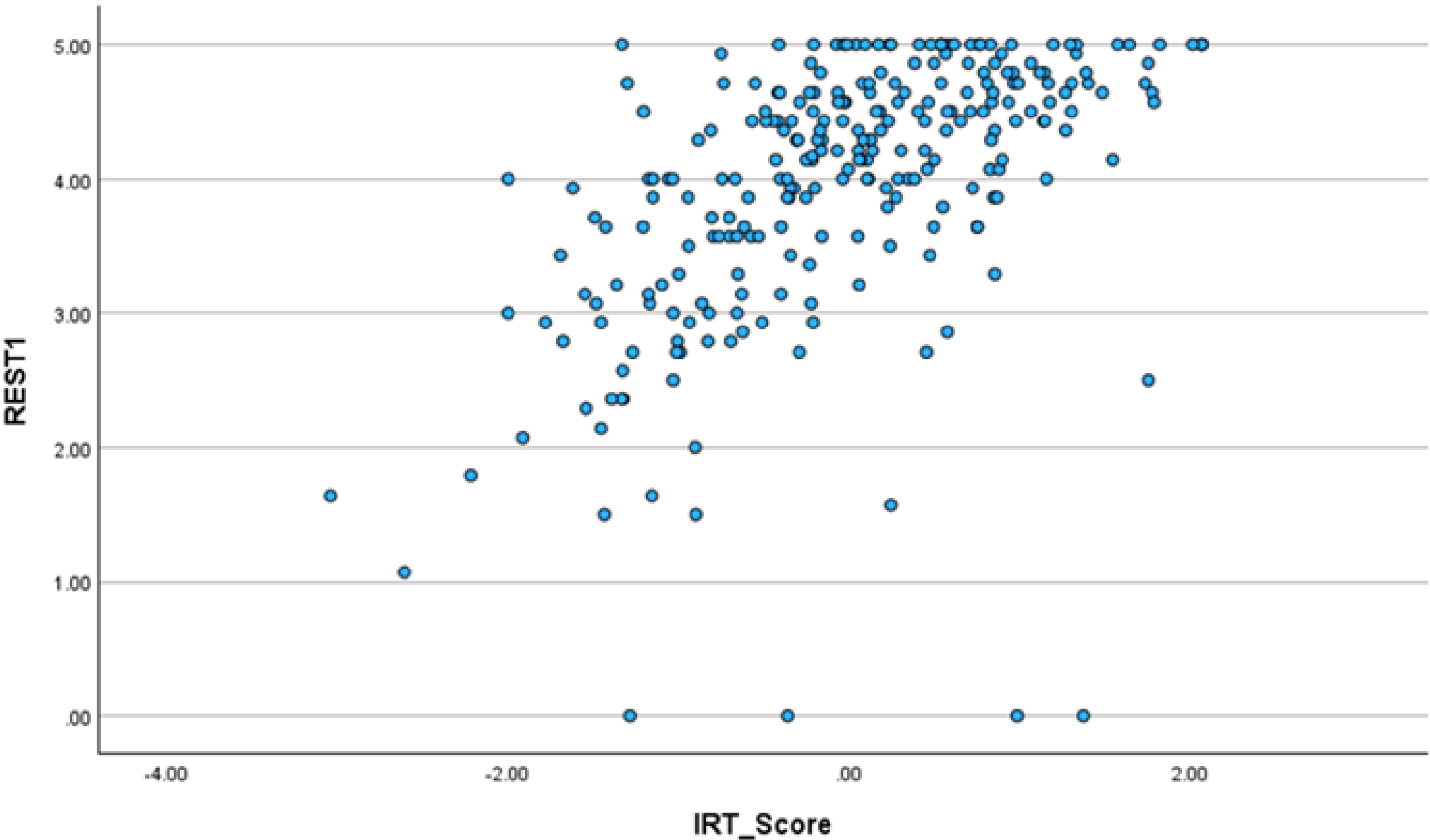


What did we learn? The PCOR-EM demonstrates a moderate correlation with the REST. Higher PCOR-EM scores correlated with stronger engagement outcomes.



Limitations of the REST?

Validating the Tool: Pearson's correlation ($r = 0.53, p < 0.001$)



The Research Engagement Survey Tool (REST)

Excellent
Very Good
Good
Fair
Poor
Not Applicable

1. Rate how well the partners leading the research focus on problems important to the community.
2. Rate how well the partners leading the research focus on cultural factors that influence health behaviors.
3. Rate how well the partners leading the research assist in establishing roles and related responsibilities for the partnership.
4. Rate how well the partners leading the research continue community-engaged activities until the goals (as agreed upon by all partners) are achieved.
5. Rate how well the partners leading the research ensure the partnership adds value to the work of all partners.
6. Rate how well the partners leading the research ensure the team builds on strengths and resources of the patient or within the community.
7. Rate how well the partners leading the research treat all partners' ideas with openness and respect.
8. Rate how well the partners leading the research ensure all partners agree on the timeline for making shared decisions about the project.
9. Rate how well the partners leading the research establish processes to support trust among all partners.
10. Rate how well the partners leading the research ensure mutual respect exists among all partners.

Supplemental Outcomes Questions

Question: Has the project resulted in outputs like publications, presentations, or reports? (n=266)

- 72% yes, 12% no, 16% N/A

Question: Have the research methods changed based on what was learned throughout the engagement process? (n=264)

- 68% yes, 20% no, 12% N/A

Question: To what extent are project outputs used by the target population or decision makers? (n=265)

- 20% to a great extent, 35% to some extent, 2% not used, 14% unsure, 29% N/A (project not complete)

Dissemination Discussion





Establish PCOR-EM as a credible, reliable engagement measurement tool



Advance scholarly dialogue about measuring engagement



Promote adoption of the PCOR-EM in practice



Support sustainability and growth of the PCOR-EM and Science of Engagement generally

Dissemination Goals

Dissemination Strategies

I. Scholarly Dissemination

- Peer-reviewed journal articles
- Conference presentations (e.g., GSA)
- White paper with position statement (e.g., Science of Engagement consortium on engagement pillars)

II. Public & Partner-Facing Dissemination

- Measurement Matters Website (resource hub and updates)
- Plain-language findings briefs (2–4 pages)
- Grey literature reports
- Newsletters
- Summits

III. PCOR-EM Application (seeking funding)

- Webinars and invited presentations to share PCOR-EM purpose
- PCOR-EM Application Instructions (V1 field guide)
- Approval to new partners to use refined PCOR-EM to expand testing opportunities while recognizing limitations

Are we missing any methods?

Potential Journal Article Topics to Help Reach our Dissemination Goals

- Qualitative Methods used for PCOR-EM Development*
- Engagement Process used for PCOR-EM Development*
- PCOR-EM Pilot and Validation Findings*
- Participatory Analysis & Interpretation Process
- Theory & Conceptual Framework Evolution
- Ethics of Measuring Engagement
- PCOR-EM Pilot Implementation & Lessons Learned
- Dissemination of Findings & Use in Practice
- PCOR-EM and its Relationship to Engagement Outcomes (REST)

** Indicates the topic is a priority for our funder, PCORI*

Are any topics missing?

Should any topics be changed or expanded?

Which topics are a priority?

Potential Journals

BMJ Open

**Health
Expectations**

**Journal of
Community
Engagement and
Scholarship**

**Journal of
Participatory
*Medicine***

**Journal of
Participatory
*Research Methods***

**Patient Experience
Journal**

**Preventing Chronic
Disease (CDC)**

**Progress in
Community Health
Partnerships**

**Research
Involvement and
Engagement**

**The Patient -
Patient-Centered
Outcomes
Research**

Other journals?

Ways to Be Involved In Dissemination

Do you want to be involved in dissemination?

- Co-authorship
 - Provide meaningful contribution to drafting and revisions
 - Be listed as a co-author/presenter
- Reviewing drafts
 - Review journals and plain language summaries, provide high level feedback
 - Be listed in acknowledgements sections of products
- Sharing through your networks
 - Share through newsletters, webinars, conferences, other avenues in your networks
 - We can help create copy



Co-Authorship Expectations

What expectations do we have for co-authorship?

- Benefits of Co-Authoring
 - Ex: Ensure publications are meaningful and accessible
 - Ex: Receive public recognition for your work
- Qualifications for Being a Co-Author
 - Ex: Make meaningful intellectual contribution to drafting and revisions
 - Ex: Share responsibility for accuracy and integrity of work
- Co-Author Responsibilities
 - Provide significant contributions
 - Provide timely feedback and approve draft
 - Disclose conflicts of interests
- Flexibility
 - Chose to work on manuscripts you are interested in
 - Engage in other ways (reviewing, sharing)
 - Receive recognition

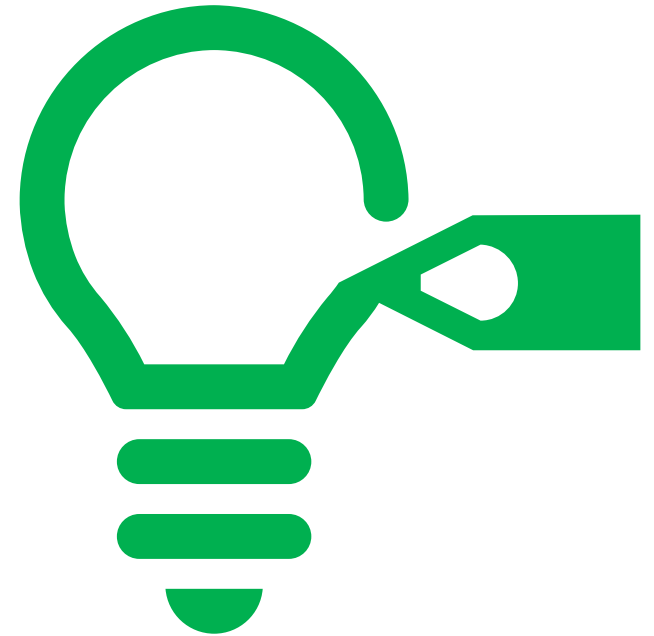


What's Next?

Dissemination
Office Hours

Listserv
Progress
Updates

Update from
PCORI on
proposals in
August!



Please fill out
the post
meeting
survey!



Thank you for your
partnership!

