

STEERING COMMITTEE MEETING NOTES

January 27, 2025, 1:00 – 2:30 pm EST

ATTENDANCE

Carrie Leach, Engaged Researcher; Kimberly Strain, Community Partner; Angela Ruddock, Community Partner; Marc Cohen, Principal Investigator; Airia Papadopoulos, Qualitative Lead; Tam Nguyen, Quantitative Lead; Missy Destrampe, Project Manager; Alexa Fleet, Research Assistant; Myrna Finn, Research Assistant; and Sophia Webber, Facilitator/Engagement Lead

WELCOME AND REVIEW

Project Updates and Progress

Sophia opened the meeting and the group reviewed the project timeline and mission. Currently, the project is in **Year 2** and moving from *Cognitive Testing* to *piloting* the PCOR-EM tool.

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

Our next step is to **pilot the tool from February to May 2025** and analyze results over the summer.

COGNITIVE TESTING DISCUSSION

Airia presented slides outlining the Cognitive Testing process and its outputs.

The Cognitive Testing refined the PCOR-EM tool from an initial 89 items to a streamlined 29-items. We conducted Cognitive Testing in two parts. In part 1, Steering Committee Members, Technical Advisors (TAs), and study team members identified items that researchers can effectively answer. This process identified 44 items. In part 2, participants completed the tool in real-time while verbalizing their thought processes, followed by detailed interviews to gather feedback on clarity, usability, and overall structure of the items. This process led to refinement of the tool from 44 to 29 items.

Cognitive Testing Key Findings

Each item received between one and ten comments for improvement. These comments included the following themes:

- Participants highlighted the need to define terms like “training” and “community partner”
- Participants emphasized the need for specificity in item wording and definitions
- Participants noted duplication and similarity between items

- Participants identified challenges with the flow and order of the tool

During analysis, the Study Team relied on Cognitive Testing feedback to create more precise wording, merge or delete duplicate items, improve instructions, and ensure a logical flow throughout the tool. Ultimately, the testing led to refinements that appear to make the tool more accessible, effective, and capable of capturing key aspects of engagement in research. The final **29-item tool** includes items that overlap across all **seven engagement themes**:

- Collaboration/power sharing (9 items)
- Trust and relationship building (9 items)
- Valuing diversity (7 items)
- Clear and transparent communication (7 items)
- Logistics and meeting techniques (14 items)
- Time and resources (6 items)
- Organizational readiness (7 items)

SUPPLEMENTAL DATA COLLECTION

Sophia presented slides on our process for collecting supplemental data during the PCOR-EM pilot phase.

Why collect supplemental data?

- To gather context about each evaluated project through the pilot (e.g., project sample size, target populations, engagement outcomes)
- To understand the respondent's demographics and engagement experience
- To validate the PCOR-EM tool by comparing PCOR-EM results with research outcomes measured by the REST tool (a validated engagement outcomes measurement tool)

How did we develop our supplemental data questions?

To determine what supplemental data to gather, we reviewed input from all our partners alongside 32 other engagement tools. We also reviewed validated outcomes measurement tools to identify which would best help us ensure consistency and comparability with existing measures. We determined that the Research Engagement Survey Tool (REST) is our best option.

We engaged Pilot Partner Subcommittee Members to pilot our draft supplemental questions. Members emphasized the importance of clear instructions and culturally inclusive language. Members also highlighted the importance of ensuring respondents understand our plans for using and protecting their data to improve confidence and response rates.

PCOR-EM PILOT PROCESS AND MATERIALS

Sophia presented slides on the next phase of the project, which is the piloting of the PCOR-EM.

Pilot Process Overview

The PCOR-EM pilot process will run from February through May 2025. Our goal is to evaluate the PCOR-EM by gathering data from a diverse sample of over 200 respondents. The pilot targets respondents who can speak to the details of engagement processes within their research projects. We seek diversity in respondent demographics, engagement expertise, and project types. Participants will complete the tool virtually. The pilot package includes supplemental questions about project characteristics, engagement outcomes, and respondent demographics to contextualize findings and validate the tool.

The **survey package** includes:

1. **Informed consent**
2. **Eligibility confirmation**
3. **Instructions** about how to complete the survey
4. **Supplemental questions** about the project (e.g., project type, population focus, sample size)
5. **PCOR-EM tool (29 items)**
6. **Engagement outcomes questions** (including validated items from the REST tool)
7. **Demographic questions** about the respondent
8. **Incentive selection** (choice of gift card)

Pilot Outreach:

We collaborated with our Pilot Partner Subcommittee to develop an outreach strategy to reach 200+ participants for the survey. We will work with our Subcommittee and formal PCORnet outreach partners to recruit PCORI-funded and PCORnet designated projects that are relevant to older adults. Key priorities for the process include ensuring accessibility, maintaining confidentiality, and achieving a balance of respondents with varying levels of engagement expertise.

Pilot Process Discussion

The group discussed potential challenges that may affect the success of the pilot process.

- Members raised concerns that valuing engagement and diversity may be challenging in the current political climate.
- A Member noted that it may be difficult to recruit the full sample size (200+ respondents).
- Members emphasized that we must ensure terms like “partner” resonate across diverse contexts by providing definitions
- Members noted that participant fatigue may prevent respondents from finishing the survey. Members suggested keeping the survey concise (ideally under 30 minutes) to maintain engagement.

The group discussed potential challenges around asking demographic questions and proposed strategies for tackling these obstacles.

- Members noted that respondents may be hesitant to provide personal information for multiple reasons, such as
 - Not understanding why the study team wishes to collect the data
 - Not understanding data security precautions in place to protect their information
 - Not feeling comfortable answering certain questions due to personal reasons, such as mental health
- Members suggested included a “prefer not to answer” option on all demographic questions
- Members suggested reiterating our confidentiality and data security measures before asking the demographic questions

Members also discussed interest in how projects utilize funding. For instance, well-funded projects may not budget for engagement as effectively as projects with limited funding that chose to prioritize engagement. Our supplemental questions do not currently ask about funding, although it does ask questions that may be associated with funding, such as sample size. Additionally, the PCOR-EM asks some funding distribution questions, such as questions about budget allocation for partner compensation. We should investigate if there are connections between project size and engagement capacity during the analysis phase.

STEERING COMMITTEE MEETING ENGAGEMENT IN YEAR 2

Sophia shared the year 2 timeline to inform discussion about engagement priorities in 2025:

- February-May 2025: Recruitment and piloting
- June-August 2025: Data analysis
- September-November 2025: Reporting

The group discussed how to best inform work in year 2. Sophia noted that the next Steering Committee meeting is scheduled for March 2025, which will fall during the pilot phase. Members agreed that they are interested in attending additional meetings during windows when they can impact change, including planning for analysis, interpreting findings, and reporting. Sophia will also share updates in between meetings to keep Members up to date.

NEXT STEPS

- Airia will apply advisor’s feedback to the pilot protocol to reduce intimidation and improve clarity for respondents
- Marc will submit pilot protocol to the Institutional Review Board (IRB) by the end of January
- Study Team will apply feedback to analysis phase planning
- Study Team will continue working with pilot partners to recruit respondents
- The Study Team will monitor the diversity of the sample during the pilot process and discuss recruitment challenges with Steering Committee Members
- Steering Committee Members will fill out meeting evaluations survey

- Sophia will share meeting notes and recording with all Members
- Sophia will schedule year 2 Steering Committee meetings