

P2P Program Evaluation Report

Patient-Centered Outcomes Research Institute (PCORI) Pipeline to Proposal (P2P)
Program

January 2019

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Executive Summary

Background

This evaluation report presents the findings of a process, outcome, and summative evaluation of awardee and Technical Assistance Office (TAO) activities within the Patient-Centered Outcomes Research Institute (PCORI) Pipeline to Proposal (P2P) Program. PCORI's Pipeline to Proposal Awards initiative was a multi-tiered program supporting development of community partnerships for research throughout the US, running for a total of five years from 2013-2018.

Purpose

This P2P program evaluation documents the evolution of program activities across awardee Cycles 1 through 4 (2013-2018) and outcomes in comparison to PCORI P2P program goals, identifies best practices in the development of patient-centered outcomes research partnerships, and shares lessons learned to improve technical assistance and other support provided as part of similar programs delivered by TAOs in the future.

Summary of Findings

Common findings emerging from this internal P2P program evaluation fell into common topic areas of project management, recruitment and engagement and program structure.

Project Management

- Flexibility is important, even amidst relatively short project timeframes.
- Administrative contracting and invoicing processes were associated with challenges and delays, according to both awardees and TAO staff.

Recruitment & Engagement

- It is beneficial to conduct early and wide outreach to connect with potential partnership members and other stakeholders, and conduct ongoing partnership assessment to determine representation needs.

Program Structure

- The relatively brief timeframe for project implementation challenged awardees to adequately lay the groundwork to build partnerships and fully spend funds as budgeted. Despite these challenges, many awardees described establishing strong partnerships.
- Bidirectional learning benefits all types of patient-centered outcomes research stakeholders, including patient partners and organizational members.

Recommendations

The P2P Evaluation Workgroup offers recommendations related to technical assistance and program administration based on evaluation findings.

Technical Assistance

- Offering multiple and varying forms of technical assistance.
- Delivering technical assistance related to a wide variety of topics.
- Incorporate technical assistance to support ongoing community and patient education efforts.

- Useful technical assistance takes the form of peer-to-peer connections and informal discussions between awardees, in addition to structured TA efforts.
- Do not limit technical assistance opportunities to specific tiers or awardees.

Program Administration

- Early consideration of evaluation efforts to inform programmatic decision making.
- Clarify program expectations, structure, and goals to PAPOs/TAOs early on in the project.
- Simplify and systematize reporting forms and processes.
- Implement structures to facilitate efficient and timely contracting and invoicing processes.
- Set early expectations around the balance between flexibility and requirements.
- Consider shifting award levels to more substantially fund relationship and partnership development.

Introduction

This evaluation report presents the findings of a process, outcome, and summative evaluation of awardee and Technical Assistance Office (TAO) activities within the Patient-Centered Outcomes Research Institute (PCORI) Pipeline to Proposal (P2P) Awards Initiative. PCORI offers research support funding through the P2P program to encourage meaningful involvement of patients, caregivers, clinicians, and other stakeholders throughout the pre-research process. TAOs include four regional public health organizations including Trailhead Institute, Heath Resources in Action, Georgia Health Policy Center, and National Network of Public Health Institutes that have worked collaboratively over the course of the P2P to develop deliverables, templates, guides, webinars and now to evaluate the program.

PCORI Pipeline to Proposal Program

PCORI's Pipeline to Proposal Awards Initiative was a multi-tiered program supporting development of community partnerships for research throughout the US, running for a total of five years from 2013-2018. P2P awards were offered to community partnerships across the US and its territories. Awardees were categorized according to geographic location across four regions (West, Midwest, Northeast, and South), though not all awardees had a specific regional focus, and some awardees spanned multiple regions. PCORI supported P2P awardees in a series of successive steps consisting of funding and technical assistance for relationship development, infrastructure- and capacity-building. P2P Awardees could apply for a series of tiered funding opportunities that successively increase in amount of funding provided, partnership development goals and level of community engagement. By engaging community stakeholders prior to study plan development and throughout the research process, PCORI aimed to support the development of high-quality patient-centered outcomes research projects that meaningfully involve all relevant stakeholders and successfully secure PCOR funding. P2P program structure, including the number of technical assistance providers and program tiers, shifted over time in response to lessons learned throughout the initiative; these changes are documented in this evaluation report.

PCORI developed P2P Awards in alignment with larger organizational priorities and goals, with the aim of supporting and accelerating patient-centered outcomes research (PCOR), dissemination, and implementation. PCORI Engagement goals¹ and P2P Program goals² are detailed and aligned in Table 1 below.

Table 1. PCORI Engagement and P2P Program Goals.

PCORI Engagement Goals	P2P Program Goals
1. Build a PCOR community	1. Strengthen relationships between researchers, patients and stakeholders, particularly in communities that have been underrepresented in research.
2. Engage the PCOR community in research	2. Build capacity for community partnerships to create research questions and submit patient-centered research proposals that can be considered for PCORI funding.

¹ PCORI. (April 2016). *Engagement*. Retrieved from <https://www.pcori.org/about-us/our-programs/engagement>

² PCORI. (2014). *Pipeline to Proposal Awards Initiative: Inaugurating PCORI's Engagement Awards Program*. Retrieved July 25, 2018 from <https://www.pcori.org/assets/2013/06/PCORI-Overview-Pipeline-To-Proposal-Awards-061713.pdf>.

PCORI Engagement Goals	P2P Program Goals
	3. Engage partnerships in research process and development of dissemination and implementation plans.
3. Promote dissemination and implementation of PCOR research findings	4. Successfully establish an infrastructure for patients, caregivers, and other stakeholders to increase Comparative Effectiveness Research (CER) information and engagement in research, dissemination and evaluation.

This evaluation reflects the time period of P2P program implementation, 2013 – 2018, and incorporates available data from all partnerships that were awarded across cycles and tiers across the entire P2P program timeframe. Awardee groups, corresponding start dates and geographic regions represented are presented in Table 2 below.

Table 2. Awardee timelines and descriptions.

Awardee Group	Start Date	Awardee Region(s)
Cycle 1, Tier I-III (Pilot)	March 2014	West
Cycle 2, Tier I-III	May 2015	East, Midwest, South, West, National
Cycle 3, Tier I-II	August 2016	East, Midwest*, South, West, National
Independent Tier III	April 2017	East, Midwest,* South, West, National
Cycle 4, Tier A	October 2017	East, Midwest,* South, West, National

*Beginning 2017, technical assistance for Midwest awardees provided by HRIA (Eastern TAO), NNPHI (National TAO), or Trailhead Institute (Western TAO)

Technical Assistance Offices

The P2P program evolved throughout implementation in response to lessons learned around program structure and delivery. PCORI initially structured the P2P program with a single Pipeline Award Program Office (PAPO) providing technical assistance and contract administration support to all awardees beginning in 2013. In 2015, PCORI restructured P2P program support according to geographic region, with five regional Technical Assistance Offices (TAOs) providing technical assistance support to awardees across the four geographic regions of the US (East, Midwest, South, and West) and a National provider. Trailhead Institute supported awardees from western states, the Georgia Health Policy Center supported awardees from southern states, and the National Network of Public Health Institutes supported national awardees (those representing more than a single state). Midwest awardees received support from different TAOs at various points in time: Michigan Public Health Institute supported awardees through 2016, followed by support by NNPHI (National TAO), HRIA (Eastern TAO) and Trailhead Institute (Western TAO).

Evaluation

Purpose

This P2P program evaluation documents the evolution of program activities across awardee Cycles 1 through 4 (2014-2018) and outcomes in comparison to PCORI P2P program goals, identifies best practices in the development of patient-centered outcomes research partnerships, and shares lessons learned to improve technical assistance and other support provided as part of similar programs

delivered by TAOs in the future. The P2P Evaluation Workgroup (“Workgroup”) consisting of representation from each of the regional TAOs and PCORI Program Officer coordinated this evaluation as the P2P program neared completion. Evaluation findings are intended for use by an internal P2P program audience; specifically the regional Technical Assistance Offices (TAOs), P2P awardees, PCORI, and other relevant stakeholders as determined by the Workgroup. Evaluation findings will be used to identify best practices and develop corresponding recommendations to improve similar programs in the future.

Context

This internal program evaluation was designed and conducted by TAO staff members. This evaluation plan was developed and finalized between June and August 2018. The evaluation utilized existing secondary data generated throughout program implementation, with substantial reliance on program reports submitted by awardees and TAOs. The Workgroup conducted this internal evaluation to ensure documentation of the lessons learned throughout P2P for future application by TAOs.

Design

This internal program evaluation was conducted by Trailhead Institute staff, Senior Program Manager Courtney Fultineer and Evaluation Manager Tristen Hall. Ms. Fultineer brings extensive experience with program implementation and coordination, including the P2P program, and Ms. Hall contributes extensive experience in public health and health care program evaluation. The evaluation purpose and design was informed by regular input, guidance, and interpretation from the Workgroup, consisting of representation from each current TAO.

This evaluation was designed and implemented with input from the Trailhead P2P Evaluation Workgroup, including representatives of TAO staff, including Trailhead, GHPC, HRiA, and NNPHI, as well as PCORI. The evaluation plan was developed in an iterative review process and finalized with approval from these stakeholders.

P2P Program Logic Model

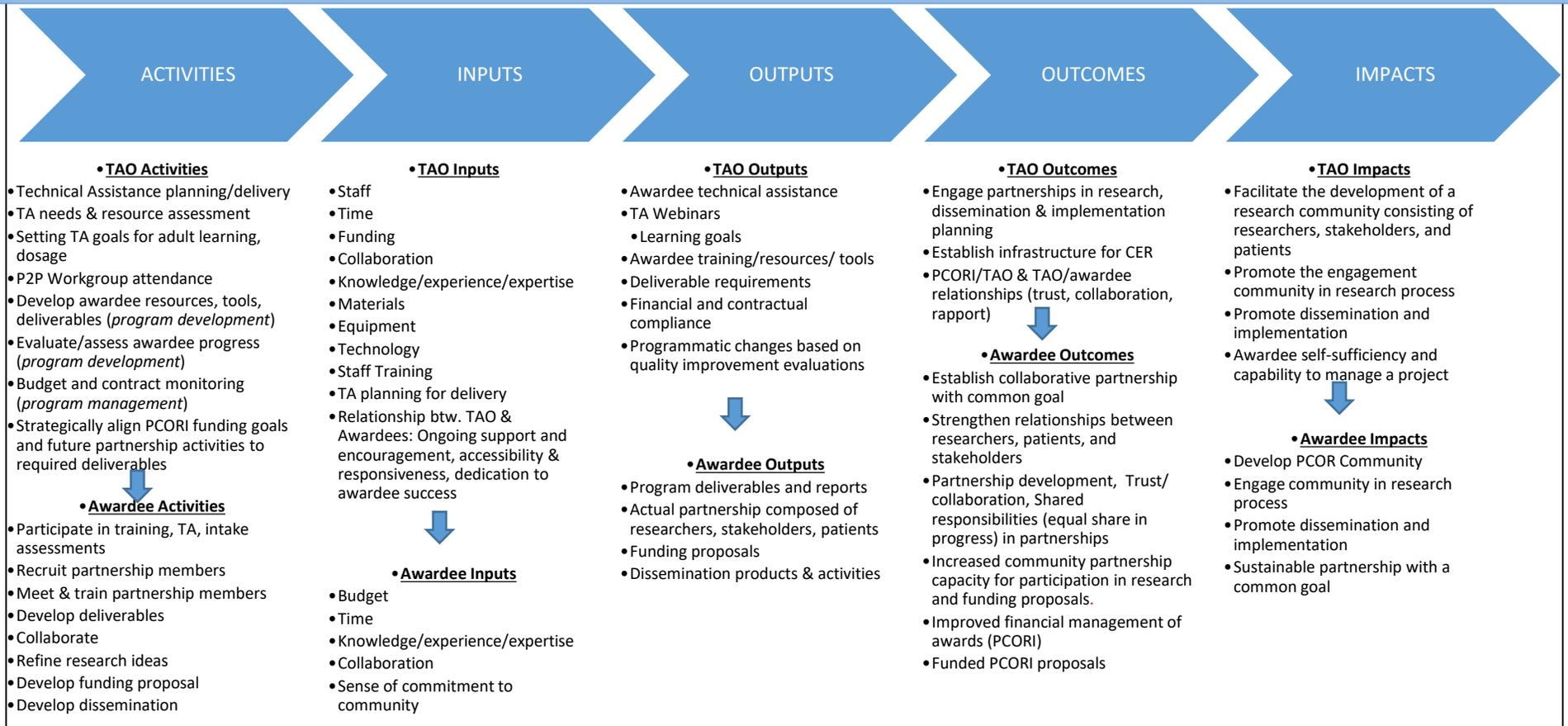
The P2P program logic model guiding this evaluation incorporates overarching PCORI and P2P program goals, and outcomes of particular interest to TAOs, P2P awardees, and PCORI. Activities, inputs, outputs, outcomes, and impacts are divided according to sector, with specific elements for TAOs and Awardees. The logic model depicts the theorized relationship between the activities that P2P awardees and TAOs perform, the resources they input and utilize, outputs that we anticipate awardees and TAOs will produce as a result of activities, short-term outcomes and longer-term impacts. See Figure 2 for P2P Program Logic Model.

PCORI Goals:

1) Develop PCOR community. 2) Engage community in research process. 3) Promote dissemination and implementation.

P2P Program Goals:

1) Strengthen researcher-patient-stakeholder relationships, particularly in underrepresented communities. 2) Build partnership capacity for PCOR research and funding. 3) Engage partnerships in research process; development of dissemination & implementation plans. 4) Successfully establish infrastructure for patients, caregivers, & other stakeholders to increase CER information and engagement in research, dissemination, and implementation.



Contextual Factors

- Diversity of awardee partnerships- size, capacity, topic, resources, organization types
- Awardees located throughout US- variety of geographic, SES, health services, conditions, needs, culture, disparities, political environment
- Mid-program structure change
- Upcoming P2P Program completion

Conceptual/Theoretical Frameworks

- PCORI P2P Program structure
- Comparative Effectiveness Research (CER)
- Awardee-selected models (e.g. Community-Based Participatory Research (CBPR), Community Engaged Research (CENR))
- Health behavior change models (awardee level)

Figure 1. P2P Program Logic Model

Document last updated: 1/24/2019

Evaluation Approach

Evaluation Objectives

We used process, outcome, and summative approaches to achieve the purpose of this internal evaluation as the P2P Program neared completion. Overarching evaluation objectives are as follows:

1. Describe P2P program implementation and outputs including technical assistance delivery, program development, and program monitoring (*process evaluation*);
2. Describe short-term P2P outcomes in partnership relationships, capacity, engagement in research, and related infrastructure (*outcome evaluation*); and
3. Assess progress toward program goals and provide recommendations for improvement related to program effectiveness to inform future implementation of similar programs (*summative evaluation*).

Evaluation Questions

This evaluation focuses on TAO and awardee activities and outcomes, the contribution of TAO support to awardee activities and outcomes, and identification of best practices in support and implementation of PCOR partnerships. Process, outcome, and summative evaluation questions are presented below in Table 3.

Table 3. P2P process, outcome, and summative evaluation questions.

Evaluation Type	Evaluation Questions
Process Evaluation	<ol style="list-style-type: none"> 1. To what extent did TAOs... <ol style="list-style-type: none"> a. Deliver technical assistance, training, resources, and tools to awardees? b. Accomplish program deliverables and reports? c. Comply with financial and contractual requirements? d. Incorporate quality improvement findings to improve program implementation? 2. To what extent did awardees... <ol style="list-style-type: none"> a. Accomplish program activities, deliverables and reports? b. Develop a partnership composed of researchers, stakeholders, and patients? c. Develop funding proposals? d. Develop dissemination products? 3. How do awardees evaluate (e.g. levels of satisfaction, quality, sufficiency) support that TAOs provide? <ol style="list-style-type: none"> a. How do awardee evaluations vary by type of TAO support?
Outcome Evaluation	<ol style="list-style-type: none"> 4. To what extent did <u>TAOs</u>... <ol style="list-style-type: none"> a. Engage partnerships in research, dissemination, and implementation planning? b. Develop trust, collaboration, and rapport in relationships between PCORI and TAOs, and between TAOs and awardees? c. Establish an infrastructure to manage community-engaged research partnerships (e.g. finance and contract management, facilitating awardee skill development and collaboration)? 5. To what extent did <u>awardees</u>... <ol style="list-style-type: none"> a. Establish a collaborative partnership with a common goal?

Evaluation Type	Evaluation Questions
	<ul style="list-style-type: none"> b. Strengthen relationships between researchers, patients, and stakeholders? c. Develop trust and shared responsibilities in partnerships? d. Increase community partnership capacity for participation in research and development of funding proposals? e. Establish an infrastructure (e.g. sustainable partnerships, development of skills and capacity for research and proposal development, etc.) for community-engaged research? f. Generate funded proposals (PCORI and otherwise)? <p>6. How does TAO support <u>contribute</u> to awardee outcomes (e.g. PCOR and CER, partnership development, ensuring awardees move forward in the pipeline, partnership financial sustainability)?</p>
Summative Evaluation	<p>7. To what extent do TAO and awardee outcomes align with program and P2P organizational goals?</p> <p>8. What are best practices for provision of technical assistance to PCOR awardees?</p> <p>9. How can elements of P2P be adapted to improve implementation of similar programs in the future?</p>

Evaluation Methods

The P2P evaluation largely utilized program documentation generated throughout the course of the P2P program and compiled by program staff. Data sources included awardee reports, TAO reports, and documented technical assistance and budget activities. See full P2P Evaluation Plan for more detail about data sources.

Data Analysis & Interpretation

This evaluation used quantitative and qualitative analysis methods, according to data source type, to answer evaluation questions. We utilized quantitative elements of data sources to conduct summary statistics describing elements of program implementation and outcomes. Qualitative data analysis was performed using a thematic summary approach using template coding and editing analysis strategies. Template coding applies pre-determined codes to text to describe the content. In an editing approach, the analyst reviews data to identify emergent codes, then reviews the text according to these codes to identify emergent themes.

Results

We first present the timeline of program implementation across P2P cycles and tiers from 2014 to 2018. We then present evaluation findings, organized in chronological order of cycles and tiers, and divided according to TAO and awardee findings.

Program Timeline

Figure 2 below presents an overview of P2P cycles and corresponding program dates.

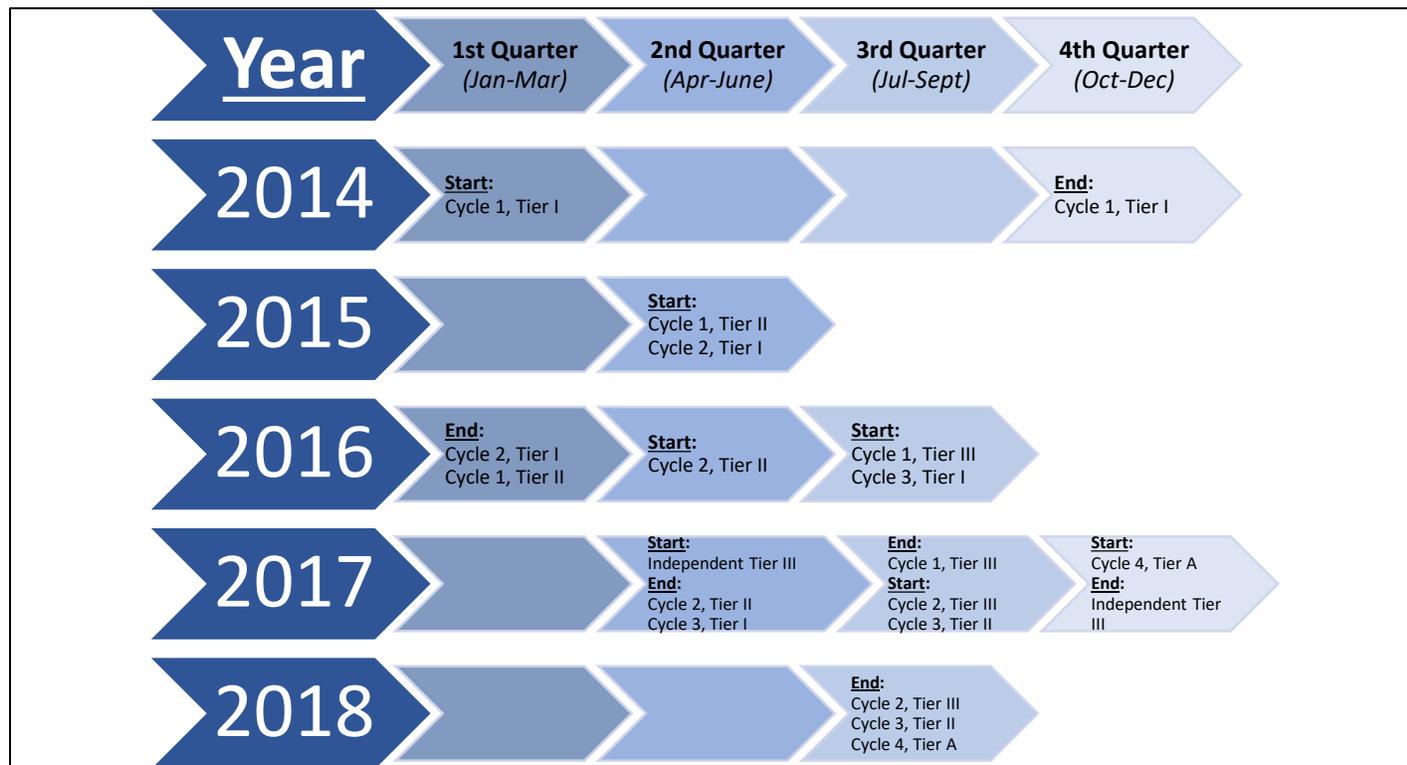


Figure 2. Timeline of P2P Program Cycles and Tiers, by year and quarter.

TAO Results

To what extent did TAOs accomplish program activities?

Technical Assistance

Forms of Technical Assistance

TAO staff compiled a Technical Assistance (TA) Inventory spreadsheet to document products and resources developed for and shared with P2P awardees. The TA Inventory spreadsheet is provided as an Appendix to this report, and includes links to shared folder locations for TAOs' future access and use, where possible.

The majority of TA products were offered via webinar, and the remaining TA products were guidance documents in Microsoft Word or Adobe .pdf formats. TAOs provided TA resources in the following topic

areas: i) communication, ii) project management, iii) grantwriting, iv) partnership development, v) research, and vi) sustainability. Of documented TA materials, the most common TA topics were research, partnership development, grantwriting, and project management. Some materials were translated into Spanish versions in response to partnerships experiencing language barriers in efforts to communicate with relevant community members and share information with key stakeholders. Table 6 below displays a summary of TA resource topic areas, the proportion of documented TA resources represented by that topic, and a brief description of select illustrative resources within each topic area.

Table 4. Summary of P2P Technical Assistance Resources

Topic Area	Example Resources	# resources	% resources
Total Resources		131	
Research	<ul style="list-style-type: none"> ▪ Research 101: <i>Basics of research principles (Webinar)</i> ▪ Elements of a Comprehensive Research Proposal (PDF) ▪ Is comparative effectiveness research right for me? <i>Introduction to CER principles (Webinar)</i> 	28	21%
Partnership Development	<ul style="list-style-type: none"> ▪ Engaging people on phone meetings (PDF) ▪ Increasing Capacity among Partnerships and Networks (Webinar) ▪ True Patient and Partner Engagement: <i>A guide on how to respectfully engage patient populations (PDF)</i> 	24	18%
Grantwriting	<ul style="list-style-type: none"> ▪ Research and Engagement Funding: <i>An overview of different types of funding (Webinar)</i> ▪ Collaborative Proposal Development: <i>Collaborating for proposal writing (Webinar)</i> ▪ Funding Resources Handout (PDF) 	22	17%
Project Management	<ul style="list-style-type: none"> ▪ Deep Dive into Deliverables: <i>Explaining deliverables (Webinar)</i> ▪ Workplan Guide: <i>Guide for completing Workplan (PDF)</i> 	22	17%
Sustainability	<ul style="list-style-type: none"> ▪ Planning for Partnership Sustainability (Webinar) ▪ Maintaining Momentum During Unfunded Times (Webinar) ▪ 10 Steps to Sustainability Handout (PDF) 	19	15%
Communication	<ul style="list-style-type: none"> ▪ Communication Plan Template (PDF) ▪ Research and Storytelling: <i>More effective dissemination methods (Webinar)</i> ▪ Using Social Media to Enhance your Partnership (Webinar) 	16	12%

Technical Assistance Delivery

In addition to the materials described above, TAOs also described in monthly reports actively delivering technical assistance to awardees in a variety of formats, including regularly scheduled phone calls,

webinars, newsletters, resources, templates, and other as-needed communication. TAOs provided technical assistance both one-on-one with individual awardees and in group settings with multiple awardees in the same cycle.

- **Regular telephone calls.** The majority of technical assistance was provided in the form of regularly scheduled one-on-one telephone and video calls between TAOs and awardees.
- **Webinars, newsletters, and as-needed telephone and email communication.** TAOs provided other forms of technical assistance, including group webinars for initial awardee introduction and orientation and ongoing partnership development topics. TAO staff conducted other telephone and email communication with awardees as needed throughout the entire awardee project timeframe.

TAOs provided awardees with technical assistance falling largely into three categories: financial, programmatic, and partnership building. Common technical assistance topics and activities within each of these categories are summarized below.

Financial

- **Timely submission of invoicing documentation.** TAOs reported spending considerable effort encouraging awardees to submit invoicing documentation in a prompt and timely fashion.
- **Budgetary assistance.** TAOs provided awardees with budgeting assistance by discussing potential budget reallocations in response to partnership activities and progress, and to ensure that awardees fully spent their budgets upon program completion.

Programmatic

- **Resources, templates, and other documents.** TAOs developed guidance documents and templates for partnerships' use, including an Operations Agreement, Communications Plan, Governance Document, Recruitment Plan, Memorandums of Understanding, and other forms for documentation of meeting attendance or incentives. In addition to developing guidance documents, TAOs identified existing resources and vetted their relevance and utility for P2P partnerships prior to sharing with awardees.
- **Webinar topics.** TAOs selected topics for and developed webinars based upon awardee input, needs, and requests. Focus areas for topic-specific webinars included grant writing strategies, CER methods, governance templates, partner and patient engagement, equity and patient engagement, communication planning and strategies, data sharing, outreach planning, maintaining momentum between funded periods, capacity-building among partnerships and networks, and evidence-based practice.
- **Feedback on deliverables.** TAOs reviewed and offered detailed feedback on awardee deliverables in order to strengthen capacity for partnership operations.
- **Facilitating contact with funding agency.** TAO staff facilitated communication and meetings between awardees and PCORI program officers.
- **Mock letter of intent peer review.** TAOs designed and coordinated implementation of a mock letter of intent peer review. In this mock review, awardees and TAOs worked together to practice the process of developing a letter of intent to submit a funding proposal, receiving valuable feedback on areas of strength and suggestions for improvement from fellow review participants.

Partnership Building

- **Ensuring broad and comprehensive partnership representation.** Urged awardees to seek out partners and engage stakeholders at the regional, state, and national levels. Assessed gaps in partnership member sectors and skills. Brainstormed and provided feedback on outreach and recruitment strategies (especially by phone/online, when in-person not feasible).
- **Sharing relevant resources, trainings, and funding opportunities.** TAOs shared web-based and in-person training opportunities and applicable funding announcements with awardees.

Lessons Learned

TAOs used lessons learned in the process of providing technical assistance and working with P2P awardees to inform support in subsequent program cycles and tiers. The most common topics of lessons learned reported by TAOs were attempts to address contracting, financing, and invoicing challenges that arose. TAOs found that contracting with awardees required being responsive to challenges that arose through the project period and constant attention to improving the process. Other common lessons learned were the importance of offering a variety of communication and technical assistance opportunities in one-on-one, group, and peer-to-peer formats.

- **Different types of organizations present different levels and kinds of contracting challenges.** Executing contracts with large institutions such as universities often presented more barriers and took longer to complete compared to smaller organizations.
- **Anticipate numerous budget modification requests.** TAOs struggled to accommodate and later came to expect awardee requests for budget reallocation, particularly near the end of project periods.
- **Facilitate the contracting process as much as possible.** In response to the variety of barriers encountered in contracting and invoicing processes, TAOs provided frequent and in-depth guidance to awardees and developed forms and templates.
- **Awardees benefit from a combination of both group and one-on-one technical assistance delivery.** TAOs reported that both group settings and more targeted one-on-one forms of technical assistance facilitated awardee progress.
- **Provide ample opportunities for peer-to-peer communication and sharing.** In addition to traditional or structured technical assistance, opportunities for less formal peer-to-peer exchanges among awardees were also important. TAOs responded to awardees' positive responses to contact with fellow awardees by expanding opportunities for remote collaboration with one another on webinars and leaving space for this communication at in-person meetings, particularly PCORI P2P Awardee Conventions.
- **Be flexible in response to awardee feedback and experiences.** TAOs worked with PCORI to revise program delivery structure and technical assistance content in response to awardee feedback throughout cycles and project periods.

Overall Findings

Overview of Established Partnerships

Awardees rated their partnerships' activity level on a spectrum ranging from "networking activities," consisting of informal roles and independent decision-making, to "collaborative activities," in which the

partnership shares a group identity, communicates with mutual trust and respect, and operates with shared decision-making. Below, Table 4 provides definitions for the five levels of partnership activity used in the P2P program.

Table 5. Partnership activity types and corresponding definitions.

Partnership Activity Type	Definition
Networking	Loosely defined roles in relation to project, little communication, all decisions are made independently.
Cooperative	Exchange information, somewhat defined roles in relation to project, formal communication, attend meetings together, all decisions are made independently.
Coordinated	Share information and resources, partners within the partnership have defined roles in relation to project, frequent communication, some shared decision making, intentional efforts to enhance each other's capacity for the mutual benefit of the project and each partner's programs.
Coalition	Share ideas, share resources, frequent and prioritized communication, shared decision making is a group norm.
Collaborative	Project partnership shares a group identity (extends beyond the project/program), frequent communication characterized by mutual trust and respect, consensus-based decision making/adequate input in advance of decisions, use of commonalities to create a unified center of knowledge and programming that supports the P2P project work and individual partner work in related content areas.

Overall, Collaborative activities were most common among P2P partnerships, with half (50%, n=103) of partnership ratings falling into this highest level of activity, across all cycles for which data were available. This was followed by Coordinated (20%, n=41) and Coalition (17%, n=36) activities. Within individual funding tiers, this pattern differed for only Cycle 3 awardees in Tier I. Cycle 3, Tier I awardees most commonly rated their partnerships as Cooperative (35%, n=16) or Coordinated (35%, n=16). Table 5 summarizes the frequency of partnership activity types across cycles and tiers.

Table 6. Partnership activity types, stratified by cycle and tier (final ratings, for all available awardee groups).

Activity Type	Cycle & Tier (% , n)						TOTAL
	Cycle 1, Tier III	Cycle 2, Tier I	Cycle 2, Tier III	Cycle 3, Tier I	Cycle 3, Tier II	Cycle 4, Tier A	
Networking	0% (0)	10% (1)	0% (0)	4% (2)	0% (0)	0% (0)	1% (3)
Cooperative	0% (0)	10% (1)	3% (1)	35% (16)	5% (2)	10% (5)	12% (25)
Coordinated	27% (6)	10% (1)	5% (2)	35% (16)	13% (5)	22% (11)	20% (41)
Coalition	9% (2)	30% (3)	20% (8)	13% (6)	18% (7)	20% (10)	17% (36)
Collaborative	64% (14)	40% (4)	73% (29)	13% (6)	65% (26)	48% (24)	50% (103)
TOTAL	22	10	40	46	40	50	208

Award Spending

Evaluation workgroup members compiled a spreadsheet to document awardees' budgeted and actual spending across all cycles and tiers. TAOs compiled complete spending information for 289 of 353 awardee projects (82%) across all funding rounds. There were awardees in each cycle and tier with surplus budget funds remaining upon project completion. A minimum of 50% of awardees within each cycle and tier completed their project with a funding surplus. See Table 7 for a summary of awardee spending by cycle and tier.

Table 7. Summary of awardee spending, by cycle and tier.

Cycle & Tier	# Awardees	Project Period (months)	Maximum Award	Average Awardee Spending	Spending Range ¹	Awardees w/ surplus ² (% , n)
Cycle 1, Tier I	30	9	\$15,000	\$13,219	\$5,748 – 15,000	60% (18)
Cycle 2, Tier I	47	9	\$15,000	\$13,068	\$4,478 – 15,000	67% (18)
Cycle 3, Tier I	47	9	\$15,000	\$13,413	\$6,159 – 15,000	70% (19)
Cycle 1, Tier II	27	12	\$25,000	\$21,587	\$2,935 – 25,565	52% (14)
Cycle 2, Tier II	44	12	\$25,000	\$24,307	\$11,059 – 43,457	50% (13)
Cycle 3, Tier II	41	12	\$25,000	\$21,204	\$7,377 – 25,171	71% (27)
Cycle 1, Tier III	22	12	\$50,000	\$43,911	\$3,032 – 56,442	73% (16)
Cycle 2, Tier III	42	12	\$50,000	\$44,239	\$19,225 – 52,560	65% (26)
Independent Tier III	4	9	\$50,000	\$44,577	\$43,755 – 45,399	100% (2)
Cycle 4, Tier A	50	12	\$50,000	\$40,288	\$7,305 – 50,000	86% (43)

¹Spending may exceed maximum award due to supplementation of funds from other sources.

²Surplus >\$100, where complete budget data available

Cycle-Specific Awardee Results

Cycle 1 – Pilot

To what extent did awardees accomplish program activities?

Awardee Successes

Cycle 1 awardees commonly identified key milestones as partnership successes, including achievements related to partner and stakeholder engagement, identification of relevant funding opportunities, and funding proposal development. Awardee engagement successes included developing relationships with

relevant researchers, securing input from patients and community members, and maintained partner involvement between funding periods or above and beyond their initial commitment. One awardee described identifying relevant funding opportunities outside of PCORI, while others submitted letters of intent for Eugene Washington PCORI Engagement Awards. Amidst these achievements, awardees described a number of common challenges, which are described below.

Awardee Challenges

Common project challenges among Cycle 1 awardees were related to funding searches or timelines, member and partner engagement, and administrative or logistical issues. Multiple awardees described their partnerships' encounters with challenges related to seeking and securing continuous funding. This was exacerbated by a lag of up to four months between tiers of P2P, while decisions regarding funding for the subsequent tier were made. Many awardees cited challenges maintaining project momentum and member participation in lulls between funding periods. Some encountered difficulty maintaining participant engagement following LOIs not being invited for a full funding proposal, or helping community members understand the implications and reasons for such decisions.

- **Engagement challenges** that awardees experienced included inconsistent member participation, turnover in patient representative membership, and securing sufficient engagement from key stakeholders in core research tasks after initial outreach:

"Lack of participation in consuming the literature/evidence. I do think much of this may be due more to lack of knowledge on how to do it."

- **Administrative and logistical challenges** included the common scheduling issue of identifying a common meeting time among stakeholders representing wide range of disciplines, the sheer amount of time required for communication and logistics, and maintaining regular meetings despite members' busy schedules.

To what extent did awardees accomplish program outcomes?

Lessons Learned

Awardees shared lessons learned over the course of their participation in P2P. Common themes in lessons learned described by awardees were to foster equitable partner relationships, network as widely and early as possible, utilize a variety of communication modes, embrace flexibility in response to conflicts, identify relevant elements of scientific and funding requirements, and anticipate administrative and logistical challenges. These lessons are described in more detail below.

- **Intentionally foster respect and equality in partner relationships.** Awardees described lessons learned around the value of building respect and equity into partnership development and ongoing relationships. They did this by considering all members' opinions and ideas, allowing community and patient partners to take the lead in conversations and decision-making. Prioritizing equitable and respectful relationships is particularly important in cases where there is a history of distrust and unequal power dynamics between particular groups and institutions.

"We have learned the importance of constantly validating our partners, and constantly stepping back to give others the opportunity to lead the conversation."

"Respect and gratitude go a long way toward maintaining positive partnerships."

- **Network as widely and early as possible.** Awardees recommended building relationships with a wide variety of sectors and organizations, even if initially they may not seem directly relevant. They described benefits of this broad outreach strategy: New partners can connect you to other relevant parties, or may have unexpected resources that are in line with partnership goals. Multiple awardees described experiences in which they assumed some outside party was not a relevant potential partner, but later discovered them to be very beneficial relationships:

"Be open to collaborations that you did not anticipate. We made a great deal of progress with our unexpected collaborator... whom we would not have met if not for this project."

They also suggested starting early to develop these relationships; to conduct outreach to engage key stakeholders early in the project timeline, and continue working to engage people throughout the project. They emphasized that this applied to community members, patients, and researchers alike.

"Finding the right partners for a long-term research team requires time and work, and can't be established overnight."

- **Use a wide variety of communication modes.** Awardees described how stakeholders have varying responses to different forms of communication, and different learning needs and preferences. Examples of these varying modes of communication included in-person meetings, email, websites, webinars, telephone calls, text messages, and social media. Multiple awardees had to adjust after initially using email as the default mode of communication to partnership members. These awardees discovered that some patient stakeholders and community members may not frequently, confidently, or easily utilize electronic forms of communication. Awardees adjusted after this early misstep by seeking out the preferred forms of communication across different partners. One awardee reported relying upon a "broker" who represents multiple roles (researcher, patient, stakeholder) to facilitate this communication toward improved relationships across sectors:

"People from multiple roles in fact represent a fourth role that is itself critical to success, that of 'broker' or 'advocate.'"

- **Communicate transparently with partners.** Regardless of communication mode, awardees described the importance of communicating transparently with partners, by thoroughly describing project intentions and asking partners for specific needs:

"We've learned that you'll never receive something you don't ask for specifically... the 'ask' is very important."

"Be transparent about your process and intentions: We have striven for transparency throughout our recruitment procedures, and we will continue to do so. When people are committing to being a part of something new, it is key that the parameters are set openly and clearly."

- **Embrace flexibility in response to conflicting perspectives or unexpected developments,** as mismatches may arise between patient and research perspectives. This advice arose repeatedly in relation to flexibility in multiple aspects of the project, including the timeline for planning and implementation, research methods and approaches, topic area focus, and the level of engagement and input expected from different partners and over time.

"Many of the patient ideas could not be tested in a scientific process as required in a grant. It took a great deal of time to arrive at a question we felt was both what patients wanted and what researchers could explore."

"Don't get discouraged when the ideas from the patient-centered work don't match with requests for proposals. It is important to continue to work together to find ways to fund and sustain partnerships even if that funding is not for research specifically."

In particular, flexibility for the project implementation timeline was noted as key:

"The community has its own timeline and it cannot be forced... Your ideas may not be congruent with the community's ideas so an open mind and flexibility is crucial for effective partnerships to be built."

"Be flexible" is common advice in patient- and family-engaged undertakings, that sounds a lot more straightforward than it is.

"Remember that community members are on their own time schedule requiring flexibility and fluidity with meeting goals. Even though you have an agenda and an idea of how the meetings should go, I have found that it is important to allow some deviation. This has shown to be important to communicate to members that their voice and ideas are important and you value what they think."

- **Learning about scientific elements, funding requirements, and associated timelines is critical.** All types of partners, academic and community included, sometimes need education to fully understand the research methodology associated with specific funding opportunities and the deliverables associated with projects. Conduct research early on to learn scientific/research

aspects, what other partners are needed. Educate members to ensure that the entire partnership has a working understanding of current project requirements, roles, and expectations.

“Our biggest lesson to date is discovering the complexity of mapping the concerns of Patient Ambassadors and clinicians onto the technical demands of CER [comparative effectiveness research].”

“We learned that we need to be aware of and develop strategies to address the fact that our patient stakeholders have very different levels of experience and consciousness regarding research.”

- **Do not underestimate administrative and logistical challenges.** Different types of organizations, from small nonprofit community organizations to universities, present a variety of challenges. Logistical challenges often emerge in efforts to convene patient and academic partners. Unexpected requirements for human subjects review of engagement activities may create considerable delays. Multiple awardees described the implications of this lesson succinctly:

“Everything takes longer than anticipated, and is much more complicated than it appears at face value.”

“The political structure of institutions can cause big roadblocks, even for people in positions of authority.”

Would you do P2P again?

Upon completion of Tier III, Cycle 1 awardees were asked to explain whether they would do the P2P program over again. The vast majority of participants indicated that they would repeat P2P if given the opportunity, citing that program participation enabled their partnership to carry out key activities, learning, and accomplishments. These benefits included development of partnerships and advisory groups, engagement and relationship-building with patients, community members, and researchers; seeking and securing additional funding, and capacity-building on the part of stakeholders and community partners, such as better understanding patient-centered outcomes research, identifying gaps and barriers in their research topic, and increased confidence pursuing scientific research funding proposals.

Though less common, multiple awardees suggested fit issues between community partnership projects and PCORI funding opportunities. For instance, one awardee reflected that they would have shifted project goals to better fit the P2P program, while another suggested that there may be some level of disconnect between P2P’s focus on community engagement and PCORI funding opportunities that generally favor the straightforward, scientific CER model. Just one awardee reported that they would not repeat their P2P participation after concluding there was a mismatch between their research topic and a CER approach, given the relative rarity and lack of evidence around the condition. Despite citing drawbacks related to fit, one awardee reflected on their P2P participation in the following way:

"I still feel that the P2P project is one of the only mechanisms that provides resources for building community capacity."

Cycle 2

To what extent did awardees accomplish program outcomes?

Lessons Learned

- **Establish partnership structure and plans that meet the group's specific needs.** Awardees described the need to agree upon partnership operations and meeting structures, though plans varied in formality in different groups and over time. Program office resources, including governance and recruitment templates, offered a good start for some awardees, but often weren't a perfect fit. One awardee encouraged future partnerships to customize partnership plan templates rather than using those offered by program offices as-is, while another awardee described their success utilizing other partnership plan templates located through web searches.

"The provided governance and recruitment templates may be too complex for a small, pilot project; remember that these can be customized to fit your needs."

Awardees emphasized roles and responsibilities for partnership members, but implemented this structure in different ways. While some maintained the same individuals in facilitator and note-taker roles, others rotated these roles across all partnership members, and another partnership engaged an external, professional meeting facilitator. Other examples of changes in partnership operations included shifts in group leadership as well as changes to decision-making processes. These changes highlight the need for ongoing flexibility in partnership structure and operations, described by one awardee in this way:

"We have learned that this is an organic, evolving process and we must allow space for that."

- **Utilize a variety of recruitment and ongoing engagement strategies.** Multiple Cycle 2 awardees emphasized the intentional use of varied strategies to recruit relevant partnership members and maintain their engagement and participation. Multiple awardees described learning the value of face-to-face meetings and communication for recruitment and ongoing engagement. Other strategies included reaching out to partner organizations, in addition to individual members, for connections to other relevant stakeholders, as well as identifying and emphasizing the value of partnership participation to various members. One awardee described this in the following way:

“It’s important that our partners see ‘what’s in it’ for them. If we can plan our PCORI meetings and activities so that they see value for them individually and collectively, then we are more likely to maintain their engagement.”

Cycle 3

How do awardees evaluate TAO support?

Awardees described the most helpful aspects of TAO support. Awardees commonly highlighted linkages with other awardees, ongoing check-ins, and resources addressing specific questions that arose throughout the project.

- **Linkages with other awardees.** Awardees highly valued one-on-one connections with similar awardees and opportunities to convene with one other via conference calls and in-person meetings, particularly PCORI P2P Awardee Conventions. Multiple awardees highlighted the utility of TAOs linking them to other awardees doing similar work, and being able to ask them specific questions.

“Our Project Officer provided connections with other PCORI projects to help us address our concerns and questions... It was extremely helpful to connect with other PCORI projects who also have a community focus and learn how they approached their work.”

“The most helpful assistance we received from the PAPO came from the in-person meeting and calls with previous awardees. We especially appreciated hearing candid discussions about how to develop community-academic partnerships in difficult settings, how to build trust, and how to engage community partners.”

- **Regular check-ins.** Awardees appreciated regular check-ins in the form of monthly phone calls and email reminders from TAOs. This core element of support was an important avenue to maintain lines of communication between awardees and TAOs, and help awardees maintain progress.

“The most helpful assistance has been the monthly check-in calls to discuss project status and participate in collaborative problem solving.”

“Reminders to stay on track.”

- **Resources and information to address questions arising along the way.** Awardees valued TAOs’ responsiveness to their needs throughout the project. Rather than identifying any particular topic or resources, many awardees highlighted the timely and relevant information, resources,

and feedback that TAOs offered in response to questions or problems that emerged throughout the project.

“Our TA was exceptionally helpful in providing us resources, connecting us with other groups, and finding us a collaborator.”

“The assistance from our PAPO was terrific. He provided us with useful feedback and direction and was effective at identifying resources for us.”

“It was invaluable to have our PAPO readily available to answer the questions that arose throughout the project and to receive assurance that we were headed in the right direction. We really felt that this assistance helped set us up to succeed.”

To what extent did awardees accomplish program activities & outcomes?

Challenges

Awardees described barriers and challenges encountered throughout the process of implementing program activities and accomplishing outcomes. Many awardees described challenges concerning the level of administrative burden and the difficulty of sustaining partner engagement throughout the project.

- **Managing administrative burden.** Many awardees struggled with the level of administrative burden associated with managing their award. Aspects of administrative burden described by awardees included contracting and invoicing activity, completion of monthly reports, and generally understanding program goals and PCORI expectations.

“Challenging aspects of the P2P Program... were the monthly reports that were due—the time it spent to do the reports took away from the time that could be devoted to actually having meetings with partners and working to develop our research plan more fully.”

“The logistics involved in being a large university with a complicated infrastructure attempting to interface with an organization such as PCORI often created barriers to completing tasks, such as invoicing and budgeting difficult and time consuming.”

- **Sustaining partner engagement.** Awardees described difficulties associated with sustaining partner and stakeholder engagement throughout different stages of partnership development, and maintain momentum of partnership efforts along the way.

“The most difficult parts of our work have included the tasks of administrative burden as well as that of trying to maintain levels of excitement and engagement that are needed to sustain the type of activities required to move forward in a consistent manner that will effect change and accomplishment of stakeholder/project objective.”

Impact

When asked to describe the impact of their partnership efforts on the healthcare community, awardees described varying degrees of success. While most described making impacts to improve knowledge and awareness of their health topic of interest among key stakeholders, some reported that they did not yet feel they had impacts to report in this area.

- **Knowledge and awareness among important stakeholders.** Many awardees reported impacting levels of knowledge and awareness around the value of patient and community input in research efforts, and perspectives in support of their specific health topic.

“It has exposed professionals to the importance of including patients in this type of work and will hopefully serve as a model for our organization going forward.”

“The most recognizable impact has been on our healthcare partners (physicians, nurses, nurse practitioners, etc). We were able to directly observe changes in their ways of thinking about the health topic... and effective responses.”

- **No impact... yet.** A subset of awardees did not feel that their partnerships had made substantial impact in the relevant healthcare community. However, most of these respondents reported that their partnerships felt well-positioned to continue their efforts moving forward.

“At this point, we do not feel our partnership has had a significant impact on the healthcare community of our chosen health topic. However, we believe that there yet exists the potential for positive impact as we continue to make progress on our objectives as a partnership.”

“Our partnership’s work is really just beginning. The partnership has not had any measurable impact... However, we feel proud that the group has ignited a growing conversation about gaps in health care quality and research in this space, at least locally, and we look forward to continuing the conversation beyond the project period.”

Unanticipated Outcomes

Awardees reported benefits or accomplishments that were not initially anticipated to emerge from their projects. Common unexpected outcomes were the strong level of passion for partnership efforts, and developing stronger and different relationships than expected.

- **Intense support and passion for partnership efforts.** Awardees described how encouraging it was to discover the high level of engagement and interest in partnership goals among stakeholders and wider communities. Often, this strong support translated into committing time and effort to partnership efforts.

“The most profound unexpected benefit of building this partnership has been the tremendous amount of passion and support in the community.”

“The most unexpected benefit has been the building of a caring community. It has been so heartening to discover such a broad, diverse community so strongly committed to caregiving and concerned about youth caregivers.”

“We have been thrilled and humbled by the commitment of our patient partners on this project. Our two Community Advisory Board members have consistently gone ‘above and beyond’ to contribute their time, effort, and perspectives to make this project a success.”

- **Stronger relationships than expected.** While awardees knew that building relationships with new partners would be a key piece of partnership development, many reported developing stronger and deeper relationships than initially expected with individual community partners and other stakeholders. Some discussed connecting with different types of partners than they first thought they would engage. Some reported developing strong personal friendships as a result of their partnership efforts. Many emphasized the importance of trust in sustaining partnership efforts in relation to these stronger than anticipated relationships.

“The rate at which our partnerships have strengthened has been an unexpected benefit for the academic team.”

“The personal relationships we have established with our patient partners in particular was not expected.”

Lessons Learned

- **Be intentional and thoughtful in building relationships with patients and stakeholders.** Awardees reported that it takes a great deal of effort to identify and engage the correct stakeholders and partners. Awardees described the challenges associated with identifying partners with goals aligning with the partnership, and skills complementary to existing leaders and members.

“Start with a relatively small group and expand thoughtfully. Not everyone needs to be a stakeholder/partner on the project. Some individuals are better suited to being consultants as needed for specific skills.”

“To identify the right project co-leads is essential to project's success.”

“Recruit and select partners carefully. Identify partners who have a passion for the work.”

- **The process of partnership development requires time and patience.** Awardees acknowledged that they expected building their partnership would take time. However, many described that this process still took longer than they anticipated, underestimating the time and effort required to build and maintain trusting relationships.

“We were surprised by the amount of time partnership development took. Many of the individuals on our partnership team were known to us but even with those with whom we had previous relationships, the development of trust and buy-in was still more intensive than we expected.”

“Partnership development always takes more time than you plan for. Even coming in to this project with several strong existing organizational representative partners, I think we underestimated the amount of time and effort it would take...”

- **Make ongoing efforts to maintain partner engagement and motivation.** Beyond the initial partnership development phase, ongoing effort is necessary to support continued interest and engagement throughout different stages of the project.

“We have learned that partnerships require a continual renewal and revitalization of approach and motivation to keep partners engaged. The initial enthusiasm can be quickly replaced by putting the partnership goals on the back burner... It is key to find out how to keep the partnership engaged and build on this foundation.”

Independent Tier III

How do awardees evaluate TAO support?

Awardees described which aspects of TAO support they disliked, which were most useful, and shared requests for future technical assistance. Awardees commonly requested direct document feedback and templates as particularly useful forms of TAO support. The common element of many suggestions to improve TAO support was to provide additional guidance throughout the process of LOI and proposal development.

Positive Feedback on TAO Support

- **Direct feedback on document drafts is beneficial.** Multiple awardees requested the opportunity or suggested including a mechanism for TAO or PCORI staff to review and provide feedback on letters of intent (LOIs) for funding proposals, full funding proposals, and miscellaneous reports.

"We would really benefit from PAPO review of the LOI and the full proposal."

"Continued guidance as to how to appropriately construct our LOI and ultimately the final proposal will prove invaluable."

- **Examples and templates for partnership documents are useful.** Awardees found templates and example documents to be particularly useful to support partnership operations. Examples identified by awardees included partnership governance documents, dissemination plans, and LOIs to submit funding proposals.

"Having the opportunity for us to review examples of successful LOIs as well as other proposals would be helpful to serve as a template."

"The templates and examples of the deliverables were critical to the successful completion of our proposal."

Suggestions for PCORI Support

- **Additional guidance for LOI and proposal development.** Some awardees reported wanting more substantial guidance and support for proposal development. While program officers were somewhat available as a source of information and feedback,

"I think that future proposals would be greatly aided by superior contact with the program officers to ensure the continued appropriateness of the proposals as they develop, perhaps by permitting the program officers to dispense their individual business e-mails."

"Since PCORI was funding this tier, we believe the agency could have offered more opportunities to discuss our proposal to meet the expectations of the LOI."

To what extent did awardees accomplish program activities & outcomes?

Challenges

Awardees described challenges encountered throughout the project. Common challenges identified by multiple awardees were logistics of scheduling and convening group meetings, and achieving initial and ongoing partner engagement.

- **Convening stakeholders and scheduling meetings.** The logistics involved with scheduling group meetings should not be underestimated. Awardees described considerable effort to convene partners and best facilitate their input and meaningful participation.

“[A] challenge was related to finding appropriate times for online conferences with the entire group, given everyone’s busy schedule.”

“Most difficult: Engaging patients and patient partners in a group setting... We have re-routed our approach for future proposals and included one-on-one interaction to overcome this difficult challenge.”

- **Initial and ongoing engagement.** Awardees described the difficulty of recruiting and engaging partners, and maintaining their interest and involvement throughout the project. This applied to partnership members as well as participants in community forums and other opportunities for input.

“The challenge that remains is to maintain the initial enthusiasm and strong stakeholder collaboration in our partnership. Continuing communication with all of the stakeholders remains challenging.”

“Interviews were successful and helpful but getting connected with potential participants was challenging (no call backs, participants not showing up for interview, etc.). Nonetheless, we completed our benchmark number of engagement interviews.”

“The issues of how best to recruit adolescents ... for the community forums and how to encourage their honest and open participation has been difficult.”

Lessons Learned

Awardees identified lessons learned in the process of implementing program activities and accomplishing outcomes. Common lessons identified among awardees included the value of connector role to facilitate trust in new relationships, and the considerable time involved with both administrative and relational aspects of partnership development.

- **Individuals in a connector role can facilitate trust between new partners.** Multiple awardees described using strategic connections with partners to facilitate new relationships. They reported how involvement from key partners lent partnerships legitimacy to patient and community audiences as well as organizations.

“We have learned how incredibly helpful it is to have a community advisory board member facilitate the connection to the foundation... without her, it is not likely that we would have been able to make this connection.”

“It is useful to have clinicians and support group leaders from the community advisory board, with whom patients and caregivers already trust, discuss community forums participation with patients and families. This facilitates trust and honest and open communication.”

- **Administrative and relational aspects of the partnership development process may take considerable time.** Many awardees reflected on the substantial time required to develop partnerships, particularly for administration and relationship building. Administrative elements included contract administration, institutional review board review, and the logistics of scheduling partnership meetings. Time-intensive relationship development activities included partner outreach, recruitment, and stakeholder engagement.

“Taking the time to perform stakeholder engagement, as opposed to developing research questions in a vacuum, is an arduous, but rewarding process.”

“Bureaucratic steps can take a lot of time and reaching out to PAPO whenever there is a question is the most efficient way of dealing with those problems.”

Cycle 4 (Tier A)

To what extent did awardees accomplish program activities & outcomes?

Common Challenges

Awardees described challenges encountered throughout the course of P2P implementation. Themes across awardee challenges included the relatively brief project timeframe, identifying relevant funding mechanisms to fit partnership goals, logistics of meeting planning, and balancing project implementation and recruitment activities with attempts to cultivate partnership sustainability.

- **Short project timeframe.** Many awardees highlighted that their partnership’s greatest difficulty was the relatively short one-year timeframe for project implementation. Some described the challenges of adequately communicating the unavailability of future tiers of funding under the current mechanism to partners while preserving the carefully developed relationships with those partners.

“The most difficult part was the short one year time frame; I feel like we are just getting started as the grant has ended.”

“Challenges/difficult parts may include insufficient time to gracefully finalize some activities that the patients and researchers wanted to pull together.”

“The most notable challenge of the fourth quarter was conclusion of the project. The ending of funding without an immediate continuance put extra demands on the team to complete deliverables, maximize shared collaboration and learning, and pursue next steps toward funding.”

- Fostering partnership sustainability amidst project implementation and recruitment efforts.**
 Given the relatively short project timeframe, awardees felt the pressure of getting a new partnership up and running while simultaneously planning for its long-term sustainability. This thinly spread awardees’ efforts across a variety of focus areas.

“The central challenge we faced in the last quarter was balancing the pursuit of strategies to sustain the efforts of the partnership while continuing to carry on the work of the partnership.”

“The challenge we have faced this quarter is sustainability of the partnership as we work to find funding for projects that have been identified as priorities. I would say this has been one of the most difficult parts of the work... Our group was really in the stages of relationship and trust building when we were trying to work on potential proposal opportunities.”

- Identifying appropriate funding mechanisms for ongoing partnership efforts and research.**
 Awardees struggled to find relevant funding opportunities that would help support their ongoing partnership development and engagement efforts. This was particularly difficult for awardees who discovered through engaging partners and stakeholders that PCORI’s comparative effectiveness research methodology would not be a good fit for their particular research topic.

“The most difficult part of this work has been identifying and receiving ongoing funding. We are grateful to have located corporate partners that see the value in this work, and are willing to support these early efforts.”

“The most difficult parts included trying to fit our research interests into the constraints of the comparative effectiveness research model, and then, when we realized we could not fit into that model, we found ourselves without a clear funding mechanism for our research. However, because our partnership is so strong, we are confident that we will find the funding and move forward.”

- **Logistics of meeting planning.** Some awardees experienced challenges when trying to schedule meetings across a diverse group of stakeholders and across geographic locations.

“The biggest challenge was trying to foster exchange between the two cities. Everyone in both cities wanted to meet and learn from the other group, but no one wanted to travel! In the end, we were unable to have the major cross-site meeting that we had planned, and we had to rely on webinar/conference call.”

“Logistically, it was very difficult to find a time when all or nearly all of the Advisory Board members could meet, even though we were meeting virtually. After three surveys, we settled on evening phone calls to work around work schedules.”

Unanticipated Outcomes

Awardees highlighted unanticipated outcomes resulting from their participation in P2P. Cycle 4 awardees largely reported unanticipated outcomes related to the level of partner engagement and the strength of resulting relationships.

- **Greater levels of engagement and enthusiasm than expected.** Community members and other stakeholders sometimes demonstrated even greater levels of interest and enthusiasm in partnership goals than originally anticipated. Awardees described that this contributes strongly to ongoing partnership progress.

“We were not expecting the level of engagement and found the team to be responsive, motivated, and expressed enthusiasm and excitement for capacity building, and will continue to work together. The level of interest was high even though our stakeholders are busy healthcare providers, policymakers, researchers, and service providers.”

“The amount of collaborative energy this project as ignited has been amazing! It has allowed partners to be vulnerable with one another; admitting their own needs but limitations... This process has not only started relationships, but strengthened them.”

- **Development of strong, long-term relationships with a variety of partners.** Awardees highlighted that relationships developed through the partnership development process were sometimes stronger and more long-term than anticipated. Some described engaging unexpected community and stakeholder groups that they hadn't anticipated would have goals in common with them.

"The long-term nature of the relationships were unknown at the beginning of the project. Fortunately... we found that the project partners were motivated to continue these relationships and we will continue to seek research funding."

"Although not anticipated, we've now identified a new partnership to aid in the continuation of this work... We are in discussion with another PCORI-funded group whose project starts where our work ends. We are excited to move into the next natural phase of this work."

Lessons Learned

Awardees described lessons learned in the course of their P2P award. Common themes in lessons learned by Tier A awardees were related to the extensive time required to achieve community engagement, the valuable contributions of partners, needed stakeholder education on research concepts, and disappointment regarding early program termination.

- **True and ongoing community engagement requires extensive time.** Awardees consistently described the realization or reminder of the extensive time required to truly secure meaningful stakeholder partnerships. Beyond initial outreach and recruitment, awardees must pay continued attention to positive communication and collaboration with community and patient stakeholders to establish and maintain successful relationships, regardless of the partnership's stage or maturity.

"In an essence, trust takes time and you cannot force this trust or capacity building to occur on a regimented timeline."

"Community engagement projects are time consuming and even well-established partnerships need to work on those relationships in ways that are very intentional and mission driven."

"Doing work in the community takes much longer than you anticipate."

- **Conduct intentional and ongoing education for stakeholders on the relevant research approaches and strategies.** Awardees described the importance and difficulty of effectively educating community and patient stakeholders on research methods and the value associated

with such approaches. In P2P, engaging all stakeholders in the research design process requires education and capacity building on patient-centered outcomes research and comparative effectiveness research. P2P awardees' pursuit of further monetary support from PCORI funding mechanisms required that they utilize comparative effectiveness research, which necessitated certain non-negotiable elements of the ultimate research proposal. Some awardees described difficulty achieving buy-in with stakeholders on the idea of research in general, or specific elements of the research approach.

"When working with patients, it's critically important to take the time to educate them about PCORI, PCOR and CER. It's time well spent, as they can't really play a meaningful role in patient engagement without a solid understanding."

"Community patient partners have a hard time understanding research processes let alone CER. Perhaps begin with simple research studies that are more descriptive to assist in educating community partners about the process."

"I'm sure everyone at PCORI is well aware of the uphill battle of educating and raising awareness about the unique nature of patient centered outcomes research and CER. I was surprised how much of a disconnect this is for many stakeholders."

"To invest in communities that have been underserved and under researched is essential for us to make PCOR more meaningful and useful. Yet, investing may mean spending more time building capacity, not just for partnerships, but within communities to educate on what research is and how it is beneficial."

- **Improved understanding of the value and potential contributions of community and patient stakeholders.** Awardees described having developed a better understanding of research topics and meaningful patient and community involvement in research as a result of engaging stakeholders in P2P project implementation.

“Our engagement with the community... helped us better understand different nuanced viewpoints of pain.”

“Seek help from community members or partners when dealing with challenging stakeholders from the community.”

“Patients in this project not only contributed to identifying outcomes and measurement tools that were meaningful and relevant to them, but also had significant input into the intervention and comparators chosen. Although it took time... we are confident that the return on investment will be improved recruitment, participation, and retention as well as reporting of meaningful results.”

“We identified the need for a well-rounded team of patients, stakeholders, caregivers, and researchers to build capacity around this issue as no one of these members can adequately address this issue, but together we have a better chance of doing so and from a meaningful perspective.”

- **Difficulty and disappointment with unanticipated program changes that reduced timeline and eliminated future funding tiers.** While not technically a lesson learned, many awardees understandably expressed disappointment in the unexpected reduced timeframe and funding tier elimination announced in September 2017.

“I only wish there were still the additional [funding] stages available... it's been disappointing not being able to find appropriate funding (at least not yet) to continue moving the work of this dynamic group forward.”

“We learned that building trust with communities is difficult when you have funding without a clear path forward. Without the possibility of Tier B funding... it was difficult to communicate the intent of the project to stakeholders.”

Similarly, some reported a mismatch between the adjusted project timeline and reporting requirements or completion of project deliverables and other requirements.

"One year of funding is not enough; we were disappointed in the suspension of the P2P program. Future funding will be critical to keeping some partners at the table... and helping us accomplish our goals."

"I think the time frame of one year challenged us and limited the potential of what we could accomplish."

"We have not had enough time to use up the funding... We do understand the administrative procedures necessary before the official project initiation and should have prepared for the project time adjustment earlier."

Discussion

Summary of Findings

Below we present a brief summary of common findings emerging from this internal P2P program evaluation across common topic areas of project management, recruitment and engagement and program structure.

Project Management

- Flexibility is important, even amidst relatively short project timeframes. Awardees greatly valued flexibility from TAOs in program administration and TA delivery, and stressed the need to exhibit flexibility when working with their own partnership members and stakeholders.
- Awardees and TAO staff alike highlighted complications, challenges, and time delays associated with administrative contracting and invoicing processes of the P2P program and participating organizations.

Recruitment & Engagement

- It is beneficial to conduct early and wide outreach to connect with potential partnership members and other stakeholders, and conduct ongoing partnership assessment to determine representation needs. Awardees described learning over time the importance of reaching out early in the project timeline, as well as continuing to recruit partners regardless of partnership stage in order to replace member attrition and gain representation from sectors applicable to emerging partnership interests and activities.

Program Structure

- The relatively brief timeframe for project implementation challenged awardees to adequately lay the groundwork to build partnerships and fully spend funds as budgeted. Despite these challenges, many awardees described establishing strong research partnerships with varying plans for sustainability.
- Bidirectional learning benefits all types of stakeholders to patient-centered outcomes research. There is synergy in educating patient partners on research methods early on, and implementing partnership operations that emphasize transparent communication and trust.

To what extent do achieved TAO and awardee outcomes align with program and P2P organizational goals?

- Program reports documented awardees' completion of partnership building activities and TAOs' program administration and technical assistance delivery.
- While awardees, by and large, submitted required program reports and documentation, there were often delays associated with financial and contractual tasks. These financial and contractual aspects seemed to present the greatest challenge to awardee efforts to comply with program goals and requirements.
- Unanticipated outcomes were largely related to partner engagement, including establishing connections with stakeholders whose interests initially did not seem to align with the partnership's, and building particularly strong relationships with established organizations. This aligns with intended program goals for awardees to establish and strengthen relationships.

Recommendations

What are best practices for provision of technical assistance to PCOR awardees?

Based on evaluation findings, the P2P Evaluation Workgroup identified the following best practices in provision of technical assistance to PCOR awardees.

- **Offering multiple and varying forms of technical assistance.** Different partnerships, organizations, and individuals benefit from different forms of technical assistance across different project stages.
- **Delivering technical assistance related to a wide variety of topics.** Technical assistance delivered to P2P awardees covered diverse topics, including research, partnership development, and communication. No single topic area dominated technical assistance efforts documented by TAOs or awardees.
- **Useful technical assistance takes the form of peer-to-peer connections and informal discussions between awardees, in addition to structured TA efforts.** Awardees appreciated opportunities for informal conversation and collaboration with other awardees. These connections complemented structured technical assistance that TAOs delivered.
- **Do not limit technical assistance opportunities to specific tiers or awardees.** Opening technical assistance offerings to all awardees, regardless of tier, helped TAOs offer resources and webinars that were relevant to a diverse set of awardees.

How can elements of P2P be adapted to improve implementation of similar programs in the future?

Based on evaluation findings, the P2P Evaluation Workgroup developed the following recommendations for design and implementation of future programs intended to foster researcher-patient-stakeholder partnerships.

Program Administration

- **Consider evaluation needs and plan program evaluation processes before and throughout program implementation.** Early consideration of evaluation efforts can help inform programmatic decision making and improve program design.

- **Make clear program expectations, structure, and goals to PAPOs/TAOs from the very beginning.** Some awardees perceived shifts in program expectations and structures, which at times led to frustration and hindered program planning efforts.
- **Simplify and systematize reporting forms and processes.** Use multiple choice response options, rather than open-ended items, where possible to reduce awardee and TAO burden and facilitate efficient summary of responses.
- **Implement structures to facilitate efficient and timely contracting and invoicing processes.** Utilize multiple strategies and explore additional ways to make contracting and invoicing easier for awardees and TAOs. Suggested strategies include dedicating a specific timeframe during the project planning period for contracting, coupling structures for invoicing and technical assistance to better assist awardees with financial aspects, anticipate contracting procedures according to the type of awardee organization, setting realistic expectations among awardees regarding the time associated with contracting and partnership development, and further emphasizing to awardees the importance of maintaining a cap on personnel costs in the budget in order to promote engagement activities.
- **Set early expectations around the balance between flexibility and requirements.** While many aspects of P2P require flexibility on the part of awardees and TAOs alike, stringent attention to rules is sometimes required, particularly when it comes to deadlines.
- **Consider shifting award levels to more substantially fund relationship and partnership development.** Tier I involved the most intense work, requiring relationship building, partnership development, and meaningful engagement. It may be beneficial to provide greater funding levels in initial funding tiers, rather than later stages of funding.

Technical Assistance

- **Incorporate technical assistance to support ongoing community and patient education efforts.** Awardees across multiple cycles highlighted substantial knowledge gaps in many stakeholders' understanding of research concepts, and especially comparative effectiveness research methodology.

Limitations

This internal evaluation is not a comprehensive evaluation of the P2P program as a whole. Limitations of this program evaluation include timing and data collection opportunities. The evaluation was designed and implemented near the end of program completion, limiting opportunities for instrument design and additional data collection as knowledge gaps emerge. More specifically, this evaluation took place through January 2019 and could measure only short-term outcomes to date, though many awardee outcomes and impacts could be expected to occur on a longer-term basis. Some awardees completed P2P program participation and submitted final reports several months prior to evaluation implementation, which limited our ability to incorporate any awardee activities that may have occurred since funding completion. The completeness and contents of reports that comprise evaluation data depended on awardee and TAO staff recollections, which have inherent potential for recall bias. Evaluation data sources were mostly cross-sectional and specific to the awardee cycle and tier, meaning that report content (i.e. specific questions) was often inconsistent across program years. The cross-

sectional nature of data collection efforts and inability to account for all outside variables (e.g. partnership activities outside of this program, additional funding outside of P2P) prevented definitive conclusions about causal relationships between program activities and outcomes.

Conclusion

The P2P Program funded awardees who formed collaborative partnerships across the US to develop patient-centered outcomes research projects on a variety of health topics. Collaboration was a core element of the P2P program, within awardee partnerships, across TAOs, and with representatives of the funding agency, PCORI. This regular communication allowed TAOs to inform the funder of awardee needs, leading to program changes in response. TAO collaboration created the opportunity to discuss awardee needs across the entire project, develop comprehensive, program-wide technical assistance products; leveraging the strengths of various TAOs and individual program staff. Notably, maintaining flexibility is credited with many identified awardee successes, highlighting the value and importance of allowing and demonstrating flexibility in project design and implementation, when feasible. The findings and recommendations presented in this evaluation report offer the opportunity to build upon five years of P2P awardee and staff experiences in similar programs in the future.

Table of Appendices

- A. P2P Internal Program Evaluation Plan
- B. Detailed P2P Program Timeline
- C. Technical Assistance Inventory Spreadsheet
- D. Links: Resources & More Information

Appendix A
P2P Internal Program Evaluation Plan

P2P Program Evaluation Plan

Patient-Centered Outcomes Research Institute (PCORI) Pipeline to Proposal (P2P) Program

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Background

This is a process, outcome, and summative evaluation of awardee and Technical Assistance Office (TAO) activities within the Patient-Centered Outcomes Research Institute (PCORI) Pipeline to Proposal (P2P) Program. PCORI offers research support funding through the P2P program to encourage meaningful involvement of patients, caregivers, clinicians, and other stakeholders throughout the pre-research process. TAOs include four regional public health organizations including Trailhead Institute, Health Resources in Action, Georgia Health Policy Center, and National Network of Public Health Institutes that have worked collaboratively over the course of the P2P to develop deliverables, templates, guides, webinars and now to evaluate the program.

Evaluation Purpose

The purpose of this P2P program evaluation is to document the evolution of program activities across awardee Cycles 1 through 4 (2014-2018) and outcomes in comparison to PCORI P2P program goals, assess broader program by identifying unintended benefits outside of anticipated program outcomes (e.g. collaboration, relationship development), identify best practices in the development of patient-centered outcomes research partnerships, and share lessons learned to improve technical assistance and other support provided as part of similar programs delivered by TAOs in the future. The P2P Evaluation Workgroup (“Workgroup”) consisting of representation from each of the regional TAOs is coordinating this evaluation as the P2P program nears completion. This evaluation plan and the resulting findings are intended for use by an internal P2P program audience; specifically the regional Technical Assistance Offices (TAOs), P2P awardees, PCORI, and other relevant stakeholders as determined by the Workgroup. Evaluation findings will be used to identify best practices and develop corresponding recommendations to improve similar programs in the future. Evaluation findings will be communicated using an evaluation report tailored to Workgroup needs and corresponding set of slides for use in future dissemination as needed.

Evaluation Context

This is an internal program evaluation that was designed and conducted by TAO staff members. This evaluation plan was developed and finalized between June and August 2018. The evaluation will largely or entirely utilize existing secondary data generated throughout program implementation, with substantial reliance on program reports submitted by awardees and TAOs. The Workgroup is conducting this internal evaluation to ensure that the lessons learned throughout P2P will be documented for future application by TAOs. The Workgroup acknowledges that this internal evaluation is not a comprehensive evaluation of the P2P program as a whole. PCORI is in the process of identifying the scope of work, selecting, and contracting with an external service provider to conduct a program evaluation of the full P2P program, including outcomes and impacts relevant to overarching PCORI goals. To avoid duplication of efforts and gather information that is relevant and useful to TAOs, this evaluation plan focuses on documenting TAO and awardee activities, identifying best practices, and communicating lessons learned in supporting and developing partnerships for patient-centered outcomes research.

PCORI Pipeline to Proposal Program

PCORI’s Pipeline to Proposal Awards initiative is a multi-tiered program supporting development of community partnerships for research throughout the US, running for a total of five years from 2013-2018. P2P awards are offered to community partnerships across the US and its territories. Awardees are

categorized according to geographic location across four regions, though not all awardees have a specific regional focus, and some awardees span multiple regions. The geographic breakdown for P2P Awards across West, Midwest, Northeast, and South regions of the US is displayed in Figure 1 below.¹ PCORI supports P2P awardees in a series of successive steps consisting of funding and technical assistance for relationship development, infrastructure- and capacity-building. P2P Awardees may apply for a series of tiered funding opportunities that successively increase in amount of funding provided, partnership development goals and level of community engagement. By engaging community stakeholders prior to study plan development and throughout the research process, PCORI aims to support the development of high-quality patient-centered outcomes research projects that meaningfully involve all relevant stakeholders and successfully secure PCOR funding. P2P program structure, including the number of technical assistance providers and program tiers, shifted over time in response to lessons learned throughout the initiative; these changes will be documented in the report resulting from this evaluation.

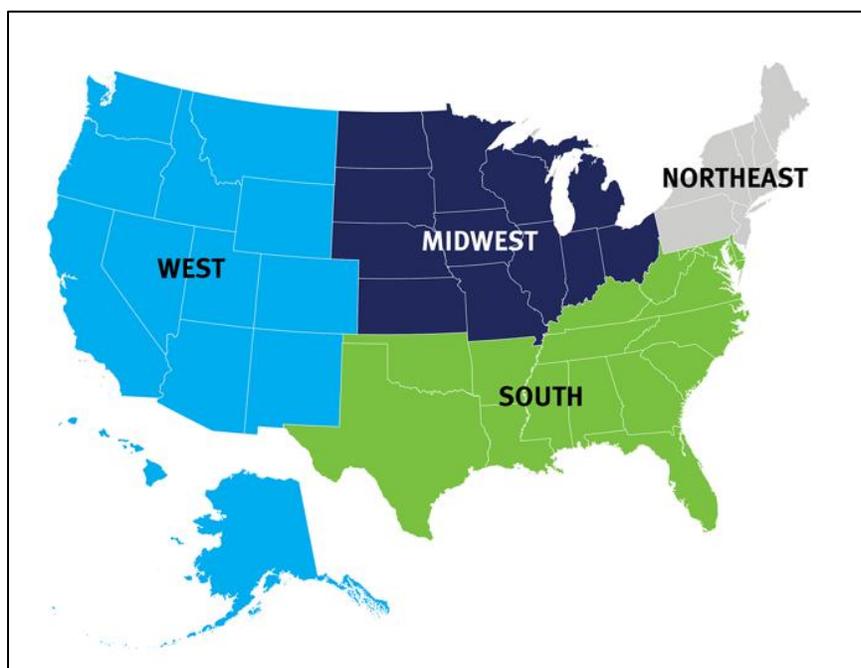


Figure 1. Regional breakdown of P2P awards across the US
(Note: Awardees representing US territories not displayed)

PCORI developed P2P Awards in alignment with larger organizational priorities and goals, with the aim of supporting and accelerating PCOR research, dissemination, and implementation. PCORI Engagement goals² and P2P Program goals³ are detailed and aligned in Table 1 below. An excerpt from a PCORI presentation on P2P program background and design,⁴ provided in Figure 1 below, provides an overview of alignment between PCORI Engagement goals and initial P2P program goals.

¹ PCORI. (2014). *P2P Background and Design*. (PowerPoint Presentation).

² PCORI. (April 2016). *Engagement*. Retrieved from <https://www.pcori.org/about-us/our-programs/engagement>

³ PCORI. (2014). *Pipeline to Proposal Awards Initiative: Inaugurating PCORI's Engagement Awards Program*. Retrieved July 25, 2018 from <https://www.pcori.org/assets/2013/06/PCORI-Overview-Pipeline-To-Proposal-Awards-061713.pdf>.

⁴ PCORI. (2014). *P2P Background and Design*. (PowerPoint Presentation).

Table 1. PCORI Engagement and P2P Program Goals.

PCORI Engagement Goals	P2P Program Goals
1. Build a PCOR community	1. Strengthen relationships between researchers, patients and stakeholders, particularly in communities that have been underrepresented in research.
2. Engage the PCOR community in research	2. Build capacity for community partnerships to create research questions and submit patient-centered research proposals that can be considered for PCORI funding. 3. Engage partnerships in research process and development of dissemination and implementation plans.
3. Promote dissemination and implementation of PCOR research findings	4. Successfully establish an infrastructure for patients, caregivers, and other stakeholders to increase Comparative Effectiveness Research (CER) information and engagement in research, dissemination and evaluation.

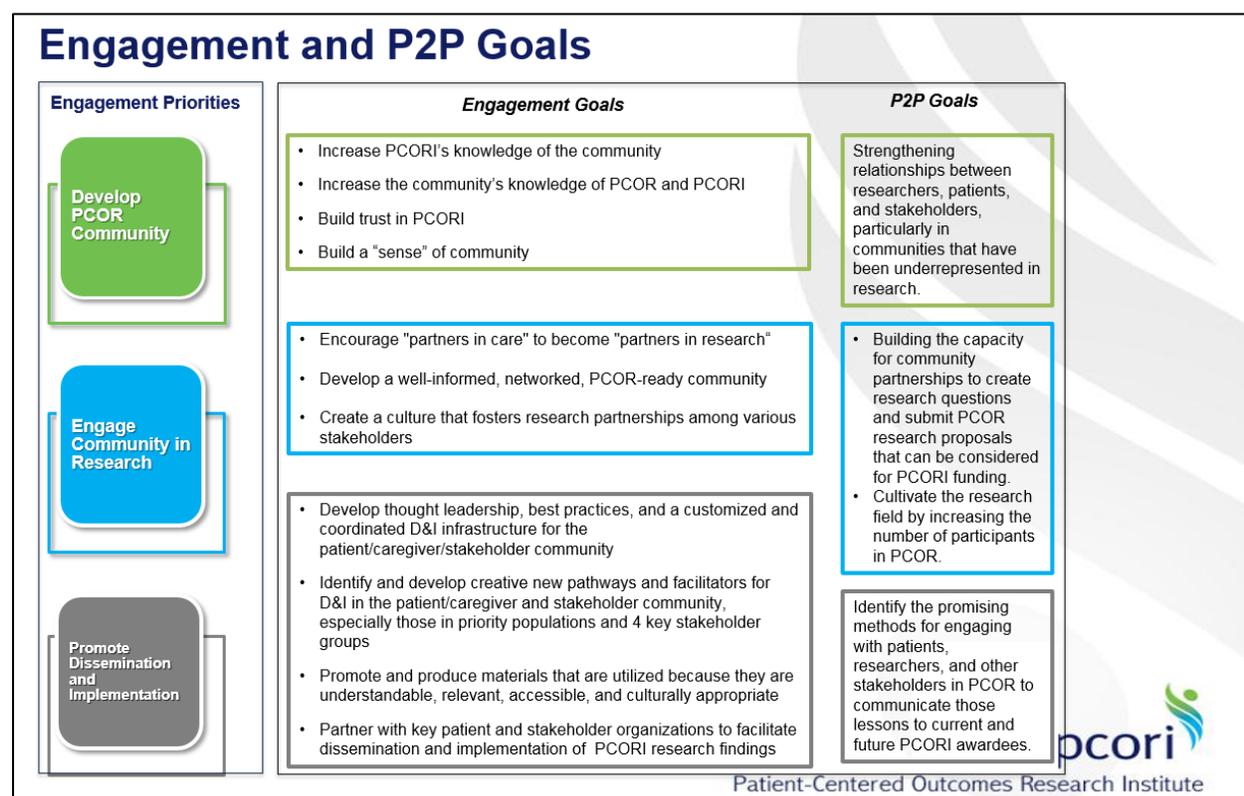


Figure 2. Alignment of goals between PCORI Engagement goals and initial P2P program goals.

This evaluation reflects the time period of P2P program implementation, 2013 – 2018, and incorporates available data from all partnerships that were awarded across cycles and tiers across the entire P2P program timeframe. Awardee groups, corresponding start dates and geographic regions represented are presented in Table 2 below.

Table 2. Awardee timelines and descriptions.

Awardee Group	Start Date	Awardee Region(s)
Cycle 1, Tier I-III (Pilot)	March 2014	West
Cycle 2, Tier I-III	May 2015	East, Midwest, South, West, National
Cycle 3, Tier I-II	August 2016	East, Midwest, South, West, National
Independent Tier	April 2017	East, Midwest,* South, West, National
Cycle 4, Tier A	October 2017	East, Midwest,* South, West, National
*Technical Assistance for Midwest awardees provided by HRiA (Eastern TAO) beginning 2017		

Technical Assistance Offices

The P2P program evolved throughout implementation in response to lessons learned around program structure and delivery. PCORI initially structured the P2P program with a single Pipeline Award Program Office (PAPO) providing technical assistance and contract administration support to all awardees beginning in 2013. In 2015, PCORI restructured P2P program support according to geographic region, with five regional Technical Assistance Offices (TAOs) providing technical assistance support to awardees across the four geographic regions of the US (East, Midwest, South, and West) and a National provider. Trailhead Institute supports awardees from western states, the Georgia Health Policy Center supports awardees from southern states, Health Resources in Action supports awardees from eastern and since 2017, Midwestern states, and the National Network of Public Health Institutes supports national awardees, which are those that represent more than a single state. Each of these TAO organizations is briefly described below.

Trailhead Institute

Trailhead Institute (“Trailhead”) is a nonprofit public health institute in Denver, Colorado, founded in 1993. Since 2013, Trailhead has coordinated PCORI’s P2P program as the main Pipeline Award Program Office (PAPO), coordinating review of program applications and funding mechanisms and providing awardees with administrative guidance, technical assistance, and resources. Beginning 2015, PCORI divided TA services into regional offices, with Trailhead providing TA to P2P awardees in Western states.

Georgia Health Policy Center

The Georgia Health Policy Center (GHPC), located in Atlanta, Georgia at Georgia State University, was founded in 1995 and provides “evidence-based research, program development, and policy guidance” to improve community health.⁵ GHPC provides technical assistance to P2P awardees in Southern states.

Health Resources in Action

Health Resources in Action (HRiA) is a public health institute located in Boston, Massachusetts with the mission “To help people live healthier lives and create healthy communities through prevention, health promotion, policy and research.”⁶ HRiA provides technical assistance to P2P awardees in Eastern states and in 2017, HRiA began providing technical assistance to P2P awardees in Midwest states.

⁵ Georgia Health Policy Center. (2018). *About Us*. Retrieved from <https://ghpc.gsu.edu/about-us/>

⁶ Health Resources in Action. (2018). *Our Purpose*. Retrieved from <https://hria.org/about/our-purpose/>

Michigan Public Health Institute

The Michigan Public Health Institute (MPHI), located in Okemos, Michigan, is a nonprofit public health institute with the mission “to advance population health through public health innovation and collaboration.”⁷ MPHI provided technical assistance to P2P awardees in Midwest states from 2015 to 2017.

National Network of Public Health Institutes

The National Network of Public Health Institutes (NNPHI) was created in 2001 and offers a national forum for member public health institutes while providing technical assistance and training, research and program evaluation, program development, capacity-building and other services across the US to support the national public health system.⁸ NNPHI provides technical assistance to P2P awardees representing more than a single region or have a national partnership.

Evaluation Team

This is an internal evaluation conducted by Trailhead Institute staff, Senior Program Manager Courtney Fultineer and Evaluation Manager Tristen Hall, to document program implementation and outcomes, and inform future implementation. Ms. Fultineer brings extensive experience with program implementation and coordination, including the P2P program, and Ms. Hall contributes extensive experience in public health and health care program evaluation. The evaluation purpose and design is informed by regular input, guidance, and interpretation from the Workgroup, which consists of representation from each current TAO.

Evaluation Design

Stakeholder Engagement

This evaluation is designed and implemented with input from the Trailhead P2P Evaluation Workgroup, which includes representatives of TAO staff, including Trailhead, GHCP, HRiA, and NNPHI, as well as PCORI. The evaluation plan is developed in an iterative review process and finalized with approval from these stakeholders.

P2P Program Logic Model

The P2P program logic model guiding this evaluation incorporates overarching PCORI and P2P program goals, and outcomes of particular interest to TAOs, P2P awardees, and PCORI. Activities, inputs, outputs, outcomes, and impacts are divided according to sector, with specific elements for TAOs and Awardees. The logic model depicts the theorized relationship between the activities that P2P awardees and TAOs perform, the resources they input and utilize, outputs that we anticipate awardees and TAOs will produce as a result of activities, short-term outcomes and longer-term impacts. See Figure 2 for P2P Program Logic Model.

⁷ Michigan Public Health Institute. (2018). *About MPHI*. Retrieved from <https://www.mphi.org/#about-mphi>

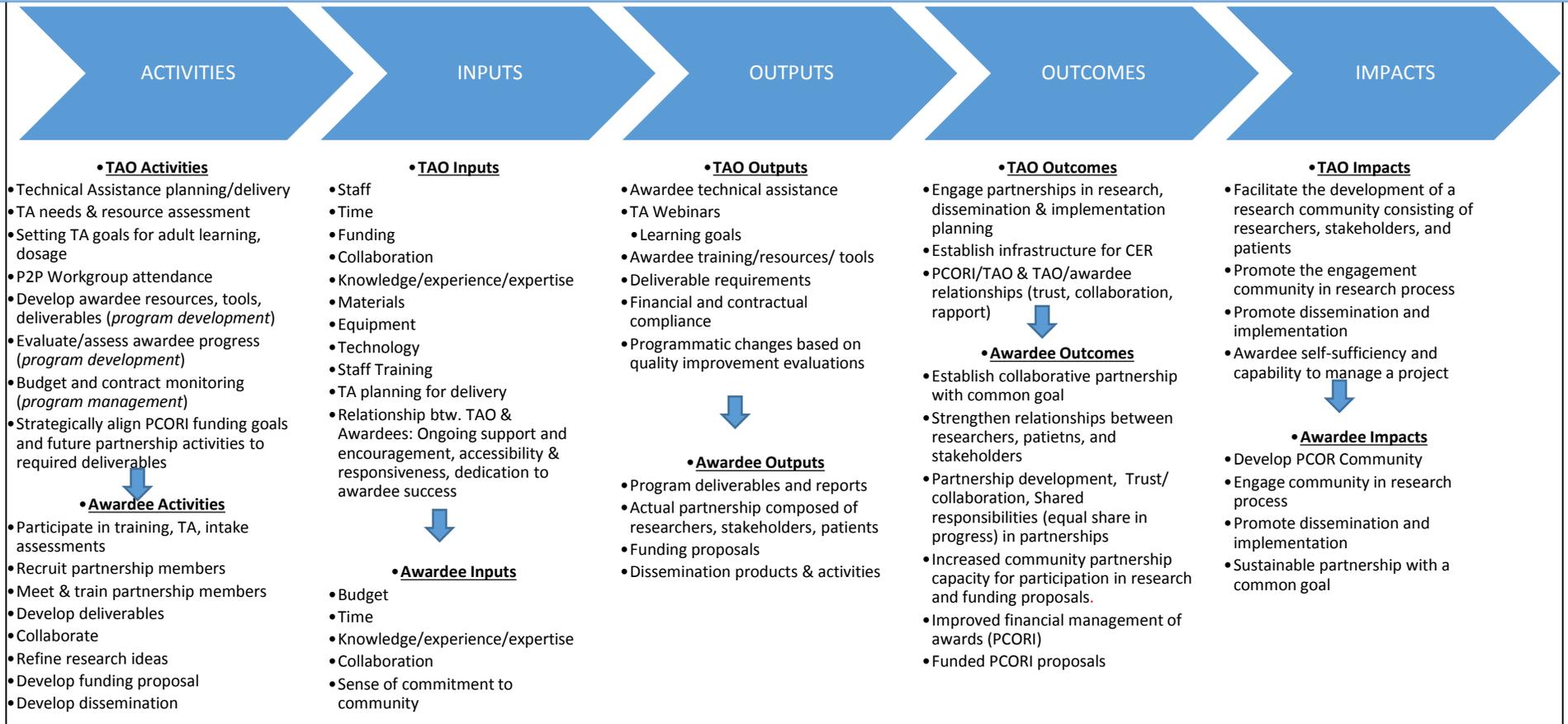
⁸ National Network of Public Health Institutes. (2018). *About the National Network of Public Health Institutes*. Retrieved from <https://nnphi.org/about-annphi/>

PCORI Goals:

1) Develop PCOR community. 2) Engage community in research process. 3) Promote dissemination and implementation.

P2P Program Goals:

1) Strengthen researcher-patient-stakeholder relationships, particularly in underrepresented communities. 2) Build partnership capacity for PCOR research and funding. 3) Engage partnerships in research process; development of dissemination & implementation plans. 4) Successfully establish infrastructure for patients, caregivers, & other stakeholders to increase CER information and engagement in research, dissemination, and implementation.



Contextual Factors

- Diversity of awardee partnerships- size, capacity, topic, resources, organization types
- Awardees located throughout US- variety of geographic, SES, health services, conditions, needs, culture, disparities, political environment
- Mid-program structure change
- Upcoming P2P Program completion

Conceptual/Theoretical Frameworks

- PCORI P2P Program structure
- Comparative Effectiveness Research (CER)
- Awardee-selected models (e.g. Community-Based Participatory Research (CBPR), Community Engaged Research (CENR))
- Health behavior change models (awardee level)

Figure 3. P2P Program Logic Model

Document last updated: 9/11/2018

Evaluation Approach

We will use process, outcome, and summative approaches to achieve the purpose of this internal evaluation as the P2P Program nears completion. Overarching evaluation objectives are as follows:

1. Describe P2P program implementation and outputs including technical assistance delivery, program development, and program monitoring (*process evaluation*);
2. Describe short-term P2P outcomes in partnership relationships, capacity, engagement in research, and related infrastructure (*outcome evaluation*); and
3. Assess progress toward program goals and provide recommendations for improvement related to program effectiveness to inform future implementation of similar programs (*summative evaluation*).

Evaluation Questions

This evaluation focuses on TAO and awardee activities and outcomes, the contribution of TAO support to awardee activities and outcomes, and identification of best practices in support and implementation of PCOR partnerships.

Process evaluation

P2P process evaluation will measure program implementation to determine the extent to which TAOs and awardees accomplished intended activities and outputs, including delivery of training and technical assistance, deliverables, financial and contractual compliance, partnership development, and associated partnership funding and dissemination products. Overarching P2P process evaluation questions are:

1. To what extent did TAOs...
 - a. Deliver technical assistance, training, resources, and tools to awardees?
 - b. Accomplish program deliverables and reports?
 - c. Comply with financial and contractual requirements?
 - d. Incorporate quality improvement findings to improve program implementation?
2. To what extent did awardees...
 - a. Accomplish program activities, deliverables and reports?
 - b. Develop a partnership composed of researchers, stakeholders, and patients?
 - c. Develop funding proposals?
 - d. Develop dissemination products?
3. How do awardees evaluate (e.g. levels of satisfaction, quality, sufficiency) support that TAOs provide?
 - a. How do awardee evaluations vary by type of TAO support?

Outcome evaluation

Outcome evaluation of the P2P program will measure short-term outcomes among TAOs and awardees, including establishment of a collaborative partnership with a common goal, community partnership research engagement, increased partnership capacity, funding proposal development, and relationship development. P2P outcome evaluation will also examine how TAO support contributes to awardee outcomes. Overarching P2P outcome evaluation questions are:

4. To what extent did TAOs...
 - a. Engage partnerships in research, dissemination, and implementation planning?
 - b. Develop trust, collaboration, and rapport in relationships between PCORI and TAOs, and between TAOs and awardees?
 - c. Establish an infrastructure to manage community-engaged research partnerships (e.g. finance and contract management, facilitating awardee skill development and collaboration)?
5. To what extent did awardees...
 - a. Establish a collaborative partnership with a common goal?
 - b. Strengthen relationships between researchers, patients, and stakeholders?
 - c. Develop trust and shared responsibilities in partnerships?
 - d. Increase community partnership capacity for participation in research and development of funding proposals?
 - e. Establish an infrastructure (e.g. sustainable partnerships, development of skills and capacity for research and proposal development, etc.) for community-engaged research?
 - f. Generate funded proposals (PCORI and otherwise)?
6. How does TAO support contribute to awardee outcomes (e.g. PCOR and CER, partnership development, ensuring awardees move forward in the pipeline, partnership financial sustainability)?
 - a. How do awardee outcomes vary by the amount and type of support (e.g. individualized technical assistance, group technical assistance, in-person learning opportunities, award management assistance, and PCORI training)?
 - i. By evaluation of support (e.g. level of satisfaction, sufficiency)?
 - ii. By dose of TAO support? (Feasibility and calculation of dose TBD – tentatively based on different types and number, duration, attendance of documented interactions between TAO and awardee)

Summative evaluation

Summative elements of the P2P program evaluation will examine TAOs and awardee outcomes in comparison to program goals, providing insight on program effectiveness and generating recommendations for implementation of similar programs in the future. Overarching summative evaluation questions are:

1. To what extent do TAO and awardee outcomes align with program and P2P organizational goals?
2. What are best practices for provision of technical assistance to PCOR awardees?
3. How can elements of P2P be maintained and/or adapted to improve implementation of similar programs in the future?

Evaluation Methods

The P2P evaluation will largely utilize program documentation generated throughout the course of the P2P program and compiled by program staff, such as awardee reports, partnership products, and documentation of applications, the review process, and delivery of support. The evaluation lead, Tristen Hall, will first conduct an inventory of data sources to develop an initial understanding of available data to inform the evaluation.

Data Sources

Reporting

P2P Awardee Reports

Awardees complete monthly, quarterly and final reports for submission to Trailhead and PCORI describing partnership structure and plans, successes, challenges encountered, unanticipated accomplishments, TA (valuable and needed), lessons learned, changes to project work plan or goals, dissemination efforts, and pursuit of funding opportunities.

TAO Reports

Each of the regional TAOs reported to PCORI on a monthly basis to describe tasks completed, upcoming planned tasks, and lessons learned from program start in 2014 through Cycle 3 in 2017, with Trailhead Institute continuing to report monthly to PCORI throughout the P2P program. From November 2017- November 2018, Regional TAOs (NNPHI, HRiA, & GHPC) reported to Trailhead on a monthly basis to describe tasks completed, upcoming planned tasks, and lessons learned.

Technical Assistance Materials & Resources

Regional TAOs provide telephone, email, webinar, and in-person training and technical assistance to support awardees. TA materials include webinar slides and partnership templates and tools developed and delivered by Trailhead, and other materials as provided by other PAPOs.

Meeting Notes

Meeting notes, such as those documenting group technical assistance workgroups and other P2P discussions, will be utilized as available to document TAO and awardee activities, collaboration across TAOs, and evolution of program structure over time.

Communication to Awardees

Awardee communication consists of documentation of official P2P-related communication, as available, from Trailhead and regional TAOs to awardees.

Financial Records

Contract & Invoicing Records

Documentation of contract administration includes awardee information, completion dates for steps in contracting process, letters of agreement, and invoicing dates.

Awardee Budgets

Awardee budget records provide documentation of awardee financial management and spending levels.

Data Source Inventory

The data source inventory (separate document) provides a list and brief description of all folders and subfolders included in Trailhead's P2P Dropbox folder. This document provides an overview of data available to address evaluation questions.

Other P2P Program Documentation

Other miscellaneous program documentation, as listed in the Data Source Inventory, will be reviewed and incorporated into the evaluation as relevant to gaps in evaluation data that emerge.

Data Collection

The evaluation team will consider the need for and feasibility of additional data collection to supplement existing evaluation data sources according to interim findings and available resources as the evaluation progresses.

Data Analysis & Interpretation

This evaluation uses quantitative and qualitative analysis methods, according to data source type, to answer evaluation questions. Methods of quantitative and qualitative analysis are described below.

Quantitative Analysis

Where possible, the P2P evaluation will utilize quantitative elements of data sources to conduct summary statistics describing elements of program implementation and outcomes. We will stratify summary statistics according to relevant characteristics of awardees and support to compare program implementation and outcomes, where possible given sample numbers and completeness of data. Analysis to generate summary statistics for quantitative evaluation data will be conducted using Microsoft Excel (or SAS/SPSS if needed).

Qualitative Analysis

Approaches to qualitative data will include content analysis and thematic summary. Content analysis is a technique to reduce large amounts of text into broader descriptive categories according to specified characteristics of its content. Where possible, qualitative data will be grouped according to similarities by awardee activity, TAO support, or other characteristic of P2P program structure. Thematic summary will describe common themes utilizing a combination of template coding and editing style analysis approaches, depending on the nature and amount of content across data sources. Template coding applies pre-determined codes to text to describe the content. For instance, we will code segments of data sources according to alignment with overarching evaluation questions: Awardee report items asking respondents to rate their level of satisfaction with TAO support will be template coded with the evaluation question, “How do awardees evaluate support that TAOs provide?” In an editing approach, the analyst reviews data to identify emergent codes, then reviews the text according to these codes to identify emergent themes. This combination of template and editing approaches will allow for emergent findings in addition to addressing pre-determined evaluation questions of particular interest to the Workgroup. All qualitative program documents will be compiled in ATLAS.ti qualitative analysis or Microsoft Office Excel software for review and analysis.

Summary of Evaluation Data & Analysis

Table 3 below provides an overview of process, outcome, and summative program evaluation questions and corresponding data sources and analysis methods.

Table 3. P2P program evaluation questions, corresponding data sources and analysis methods.

Evaluation Questions	Data Sources	Analysis Methods
Process Evaluation		
1. To what extent did TAOs...	TAO reports	Qual. thematic summary

<ul style="list-style-type: none"> a. Deliver technical assistance, training, resources, and tools to awardees? b. Accomplish program deliverables and reports? c. Comply with financial and contractual requirements? d. Incorporate quality improvement findings to improve program implementation? 	<p>Awardee reports</p> <p>Technical assistance materials</p>	<p>Quant. summary statistics</p>
<p>2. To what extent did awardees...</p> <ul style="list-style-type: none"> a. Accomplish program activities, deliverables and reports? b. Develop a partnership composed of researchers, stakeholders, and patients? c. Develop funding proposals? d. Develop dissemination products? 	<p>Awardee reports</p> <p>Partnership plans & documents</p>	<p>Qual. thematic summary</p> <p>Quant. summary statistics</p>
<p>3. How do awardees evaluate (e.g. levels of satisfaction, quality, sufficiency) support that TAOs provide?</p> <ul style="list-style-type: none"> a. How do awardee evaluations vary by type of TAO support? 	<p>Awardee reports</p>	<p>Quant. summary statistics, stratification</p> <p>Qual. thematic summary</p>
Outcome Evaluation		
<p>4. To what extent did <u>TAOs</u>...</p> <ul style="list-style-type: none"> a. Engage partnerships in research, dissemination, and implementation planning? b. Establish an infrastructure for community-engaged research? c. Establish an infrastructure to manage community-engaged partnerships research (e.g. finance and contract management, facilitating awardee skill development and collaboration)? 	<p>Awardee reports</p> <p>TAO Reports</p>	<p>Qual. content analysis and/or thematic summary</p>
<p>5. To what extent did <u>awardees</u>...</p> <ul style="list-style-type: none"> a. Establish a collaborative partnership with a common goal? b. Strengthen relationships between researchers, patients, and stakeholders? c. Develop trust and shared responsibilities in partnerships? d. Increase community partnership capacity for participation in research and development of funding proposals? e. Establish an infrastructure (e.g. sustainable partnerships, development of skills and capacity for research and proposal development, etc.) for community-engaged research? f. Generate funded proposals (PCORI and other)? 	<p>Awardee reports</p> <p>Partnership plans & documents</p> <p>Contract and invoicing records</p>	<p>Qual. content analysis and/or thematic summary</p>

<p>6. How does TAO support <u>contribute</u> to awardee outcomes (e.g. PCOR and CER, partnership development, ensuring awardees move forward in the pipeline, partnership financial sustainability)?</p> <p>a. How do awardee outcomes vary by type of support (e.g. individualized technical assistance, group technical assistance, in-person learning opportunities, award management assistance, and PCORI training)?</p> <p>i. By evaluation of support (e.g. level of satisfaction, sufficiency)?</p> <p>ii. By dose of TAO support? (<i>Tentative/TBD</i>)</p>	<p>Awardee reports</p> <p>TAO reports</p> <p>Contract and invoicing records</p>	<p>Qual. content analysis and/or thematic summary</p> <p>Quant. summary statistics, stratification</p>
Summative Evaluation		
<p>7. <i>To what extent do achieved TAO and awardee outcomes align with program and P2P organizational goals?</i></p>	<p><i>All above program documents</i></p>	<p><i>Above analyses & P2P team interpretation</i></p>
<p>8. <i>What are best practices for provision of technical assistance to PCOR awardees?</i></p>	<p><i>All above program documents</i></p>	<p><i>Above analyses & P2P team interpretation</i></p>
<p>9. <i>How can elements of P2P be maintained and/or adapted to improve implementation of similar programs in the future?</i></p>	<p><i>All above program documents</i></p>	<p><i>Above analyses & P2P team interpretation</i></p>

Limitations

Limitations of this program evaluation include timing and data collection opportunities. The evaluation is designed and implemented near the end of program completion, limiting opportunities for instrument design and additional data collection as knowledge gaps emerge. More specifically, this evaluation timeline lasts through January 2019 and can measure only short-term outcomes to date, though many awardee outcomes and impacts are expected to occur on a longer-term basis. Some awardees completed P2P program participation and submitted final reports several months prior to evaluation implementation, which limits our ability to incorporate any awardee activities that may have occurred since funding completion. The completeness and contents of reports that comprise evaluation data depend on awardee and TAO staff recollections, which have inherent potential for recall bias. Evaluation data sources are mostly cross-sectional and specific to the awardee cycle and tier, meaning that report content (i.e. specific questions) is often inconsistent across program years. The cross-sectional nature of data collection efforts and inability to account for all outside variables (e.g. partnership activities outside of this program, additional funding outside of P2P) prevents us from making definitive conclusions about causal relationships between program activities and outcomes. The ability to address the evaluation questions detailed in this plan will depend upon the availability, contents, and level of detail present in program data sources and documentation.

Communication and Use of Findings

Evaluation Report

We will communicate evaluation findings and program recommendations in an evaluation report upon completion of data review and analysis. This report will include summary of findings gleaned from evaluation data sources, as well as a table or figure displaying program cycles and tiers and

corresponding data sources and dates to describe how the program evolved across five years of implementation. We will develop a corresponding slide presentation for use by the Workgroup and other internal P2P stakeholders to communicate evaluation findings to relevant audiences. The evaluation findings and report will be finalized through an iterative process of input over several meetings between the evaluation team and larger Trailhead P2P program team.

Other Dissemination

The evaluation team will discuss potential development of other dissemination products based on the finalized evaluation report, dependent upon available resources and program needs.

Timeline

This evaluation takes place between June 2018 and January 2019. A tentative overall evaluation timeline is presented in Table 4 below.

Table 4. P2P program evaluation timeline.

	<i>Month</i>	2018							2019
		June	July	Aug	Sept	Oct	Nov	Dec	Jan
<u>Evaluation Plan</u>									
Draft Evaluation Plan to Courtney	25								
Feedback			2						
Revised Evaluation Plan to team			11						
Feedback			24						
Finalize Evaluation Plan				X					
<u>Data Analysis</u>									
Reports – Quantitative							X		
Reports – Qualitative				X	X	X			
Other program documents (e.g. communication to awardees; contracts, invoicing, timelines, administrative records)				X	X	X			
<u>Communicating Findings</u>									
Outline Program Evaluation Report				X					
Draft report sections on analysis findings				X	X	X	X		
Draft Evaluation Report for team input							30		
Feedback								14	
Finalize Evaluation Report									15
Draft Evaluation Presentation								7	
Feedback									7
Finalize Evaluation Presentation									15
<u>Relevant P2P Program dates</u>									
Final awardee timeline (Tier A) ends					30				
Final awardee reports (Tier A) due						31			
P2P program funding ends							30		
No-cost extension ends									31

Conclusion & Next Steps

This evaluation plan is a living document that is open to revision according to Workgroup input. The Workgroup will communicate, agree upon, and document any changes to this evaluation that emerge based on contextual factors or program needs. Upon finalization of the evaluation plan, evaluation activities will begin with conducting the data inventory, outlining the evaluation report, and then reviewing program documents to align available data and evaluation questions. At the outset of this alignment process, we will initially prioritize identifying data gaps that are best addressed by staff from each of the regional TAOs, in order to ensure that their input is captured prior to funding period completion. Upon finalizing the evaluation report, findings will be incorporated into Trailhead's future program activities and funding applications to further implement and document identified best practices.

Appendix B

Detailed P2P Program Timeline

Detailed P2P Program Timeline, 2013-2018

	General PCORI Activity	Cycle 1	Cycle 2	Cycle 3	Independent Tier	Cycle 4 (Tier A)
2013						
Q3						
Q4		RFP released 30 awardees selected				
2014						
Q1		TIER I START Contracting Onboarding				
Q2		Contracting Budget Revisions & Approvals Onboarding				
Q3		Mid Project Report				
Q4		Awardee Convention Tier I End	LOI LOI Review			
2015						
Q1			LOI Review			
Q2		TIER II START Contracting Budget Revisions & Approvals Onboarding	TIER I START Contracting Budget Revisions & Approvals Onboarding			
Q3		1st Quarter Report	Awardee Convention Mid Project Report			
Q4		Mid Project Report Awardee Convention		LOI		
2016						
Q1		3rd Quarter Report Tier II Ends	Tier I Ends Final report	LOI close LOI Review Invite to Apply		
Q2		Final report	TIER II START Contracting Budget Revisions & Approvals Onboarding	Application LOI Review	LOI Review LOI close	

Detailed P2P Program Timeline, 2013-2018

Q3	PCORI Cycle 3 Science LOI due	TIER III START Contracting Budget Revisions & Approvals Onboarding	1st Quarter Report	TIER START Contracting Budget Revisions Onboarding	LOI Review Application	
Q4		1st quarter report	Mid Project Report	Mid Project Report due	LOI Review	
2017						
Q1	Cycle 1 Science LOI	Mid project report due 3rd quarter report due	3rd Quarter Report			LOI
Q2			Tier II Ends	Tier I Ends	Tier Starts 1st Quarter Report Awardee Convention	LOI Review Invite to Apply Application
Q3		Tier III Ends 7/31 Final report due	TIER III START Contracting Budget Revisions & Approvals Onboarding	TIER II START Contracting Budget Revisions & Approvals Onboarding	Mid Project Report	LOI Review
Q4	PCORI Announcement to awardees of program sunset		Awardee convention 1st quarter report	Awardee convention 1st quarter report	3rd Quarter Report LOI due Tier Ends	Tier A Begins Awardee convention Contracting Budget Revisions Onboarding
2018						
Q1			Mid Project Report	Mid Project Report	Final Report Report to community	1st Quarter Report
Q2			3rd Quarter Report	3rd Quarter Report		Mid Project Report
Q3			Tier III Ends Final Report	Tier II Ends Final Report		3rd Quarter Report Tier A Ends
Q4						Final Reports

Appendix C

Technical Assistance Inventory Spreadsheet

P2P Technical Assistance Inventory

Topic Area	Audience	Resource Type	Title	Description	TAO/PAPO Creator
Communication	Cycle 2	Document/Guide	TierII_CommunicationPlanTEMPLATE_FINAL	Communication Plan Template	Trailhead
Communication	Cycle 2	Document/Guide	TierII_P2PCommunicationStrategiesGuidance_FINAL_042017	Guide for completing Communication Plan Template	Trailhead
Communication	Cycle 2	Document/Guide	Communication Plan Template FINAL	Communication Plan Template with Guidance	Trailhead
Communication	Cycle 2	Webinar	Communication Planning	Help awardees with strategizing for comms plan	HRIA
Communication	Tier A	Webinar	Shared Decision Making	Webinar on making decisions within a partnership	GHPC
Communication	Tier A	Webinar	Jennifer_PCORI 2018 webinar	Guest presenter slides for above webinar	GHPC
Communication	Tier A	Webinar	Jennifer_PCORI 2018 webinar	Guest presenter slides for above webinar	GHPC
Communication	Tier A	Webinar	PCORI P2P Tier A Decision Making Final	Slides for the webinar above	GHPC
Communication	Tier A	Webinar	PCORI P2P Tier A Decision Making Final	Slides for the webinar above	GHPC
Communication	Tier A	Webinar	Zadinsky PCORI Decision Making 2018_04	Guest presenter slides for above webinar	GHPC
Communication	Tier A	Webinar	Zadinsky PCORI Decision Making 2018_04	Guest presenter slides for above webinar	GHPC
Communication	Tier A	Webinar	Social Media Basics	How to use social media to build partnerships and communicate with partners	NNPHI
Communication	Tier A	Webinar	Using Social Media to Enhance your Partnership	Slides for the webinar above	NNPHI
Communication	Cycle 1	Webinar	Research and Storytelling	Webinar on more effective dissemination methods	Trailhead
Communication	Cycle 1	Webinar	Research and Storytelling Webinar 041917	Slides for the webinar above	Trailhead
Communication	Cycle 1	Webinar	Research and Storytelling Webinar 041917	Slides for the webinar above	Trailhead
Grantwriting	All Cycles	Document/Guide	funding_resources_handout	Handout for webinar above	NNPHI
Grantwriting	All Cycles	Document/Guide	LOI Funding Guide_FINAL	Recourse for webinar above	Trailhead
Grantwriting	All Cycles	Document/Guide	Engagement-Rubric	Resource for webinar above	NNPHI, GHPC
Grantwriting	Cycle 2 & 3	Webinar	Applying for Research Funding with a Partnership	applicant training for individuals not familiar with the process	
Grantwriting	Cycle 2 & 3	Webinar	PCORI LOI strategies	Tips/Shared Lessons Learned for completing a PCORI LOI	HRIA, Trailhead
Grantwriting	All Cycles	Webinar	Applying for Research Funding with a Partnership	Guide to applying for patient-centered research funding	HRIA
Grantwriting	All Cycles	Webinar	Applying for Research Funding with a Partnership	Slides for the webinar above	HRIA
Grantwriting	All Cycles	Webinar	Applying for Research Funding with a Partnership	Slides for the webinar above	HRIA
Grantwriting	All Cycles	Webinar	Lessons Learned from PCORI LOI Submissions	Tips for writing more successful LOIs	Trailhead
Grantwriting	All Cycles	Webinar	Lessons Learned Slides3.9..18	Slides for the webinar above	Trailhead
Grantwriting	All Cycles	Webinar	Lessons Learned Slides3.9..18	Slides for the webinar above	Trailhead
Grantwriting	All Cycles	Webinar	Research & Engagement Funding	An overview of different types of funding	NNPHI
Grantwriting	All Cycles	Webinar	Research & Engagement Funding	Slides for the webinar above	NNPHI
Grantwriting	All Cycles	Webinar	Research & Engagement Funding	Slides for the webinar above	NNPHI
Grantwriting	All Cycles	Webinar	Lossie 2018 PCORI 2	Guest presenter slides for above webinar	NNPHI
Grantwriting	All Cycles	Webinar	Collaborative Proposal Development	Webinar on collaborating for proposal writing	NNPHI, GHPC
Grantwriting	All Cycles	Webinar	Collaborative Proposal Dev't Webinar	Slides for the webinar above	NNPHI, GHPC
Grantwriting	All Cycles	Webinar	Cooke_UCDavis_LCSM_PCORI Experience Overview 12_5_17	Guest presenter slides for above webinar	NNPHI, GHPC
Grantwriting	All Cycles	Webinar	Session 2 Awardee Presentation 12072017	Guest presenter slides for above webinar	NNPHI, GHPC
Grantwriting	Cycle 2	Webinar	PCORI LOI Strategies	Tips and tricks to applying for PCORI funding	Trailhead
Grantwriting	Cycle 2	Webinar	PCORI LOI strategies presentation _Clean Notes	Slides for the webinar above	Trailhead
Grantwriting	Cycle 2	Webinar	PCORI LOI strategies presentation _With Notes	Slides for the webinar above	Trailhead
Partnership Development	Cycle 2 & 3	Document/Guide	SPANISH_GovernanceGuidanceDoc_FINAL	SPANISH Guide for completing Governance Doc Template	Trailhead
Partnership Development	Cycle 2 & 3	Document/Guide	SPANISH_RecruitmentStrategiesGuidanceDoc_Final	SPANISH Guide for completing Recruitment Strategies Doc Template	Trailhead
Partnership Development	Cycle 3	Document/Guide	GovernanceDoc_Template_FINAL	Governance Document Template	Trailhead
Partnership Development	Cycle 3	Document/Guide	GovernanceDocumentGuidanceDoc_FINAL	Guide for completing Governance Doc Template	Trailhead
Partnership Development	Cycle 3	Document/Guide	Tier I P2P Recruitment Strategies Guidance FINAL	Guide for completed Recruitment Strategies Template	Trailhead
Partnership Development	Cycle 3	Document/Guide	Tier I P2P Recruitment Strategies Template FINAL	Recruitment Strategies Template	Trailhead
Partnership Development	Cycle 2	Document/Guide	Managing Your National Stakeholder Plan Tool FINAL	National Stakeholder Tracker	Trailhead
Partnership Development	Cycle 2	Document/Guide	State Regional National Stakeholder Guidance Document FINAL	Guide to National Stakeholder Deliverable	Trailhead
Partnership Development	Cycle 2 & 3	Webinar	Governance Elements	Governance structure	HRIA
Partnership Development	Cycle 2 & 3	Webinar	Partnership Engagement	how to engage partnership members	HRIA
Partnership Development	Cycle 2 & 3	Webinar	Recruitment Strategies	bringing key members into the partnership	HRIA
Partnership Development	Cycle 2	Webinar	Engaging People on Phone Meetings	Structuring Phone meetings, agenda setting	HRIA
Partnership Development	Cycle 2	Webinar	State, Regional, National Stakeholder Engagement	outreach to different stakeholders	HRIA
Partnership Development	Tier II, Cycle 2	Webinar	State, Regional, National Partnerships	Guide to plan to connect with state and national organizations	NNPHI
Partnership Development	Independent Tier III	Webinar	Principles of Partnership Governance and Stakeholder Engagement	Presented governance template and elements of governance at awardee convention	NNPHI

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Partnership Development	Tier A	Webinar	True Patient and Partner Engagement	A guide on how to respectfully engage patient populations	Trailhead
Partnership Development	Tier A	Webinar	TruePatientPartnerEngagement 2018 final	Slides for the webinar above	Trailhead
Partnership Development	Tier A	Webinar	TruePatientPartnerEngagement 2018 final	Slides for the webinar above	Trailhead
Partnership Development	All Cycles	Webinar	Project management	How to engage and manage partners	NNPHI
Partnership Development	All Cycles	Webinar	Project Management Webinar Slides_2.8.18	Slides for the webinar above	NNPHI
Partnership Development	All Cycles	Webinar	Project Management Webinar Slides_2.8.18	Slides for the webinar above	NNPHI
Partnership Development	Cycle 3	Webinar	Increasing Capacity among Partnerships and Networks	Capacity building webinar	Trailhead
Partnership Development	Cycle 3	Webinar	Increasing Capacity among Partnerships and Networks FINAL	Slides for the webinar above	Trailhead
Partnership Development	Cycle 3	Webinar	Increasing Capacity among Partnerships and Networks FINAL	Slides for the webinar above	Trailhead
Project Management	Cycle 3	Document/Guide	TierII_WorkplanGuide_FINAL	Guide for completing Tier II Workplan	Trailhead
Project Management	Cycle 3	Document/Guide	Tier III Workplan Guide_FINAL	Guide for completing Tier III Workplan	Trailhead
Project Management	Cycle 2 & 3	Webinar	Tier I - II Transition	P2P project Deliverables expectations	HRIA
Project Management	Cycle 2	Webinar	Final Report & Tier III Documents	P2P project Deliverables expectations	HRIA
Project Management	Tier I, Cycle 3	Webinar	P2P Awards Tier I Activities and Deliverables	Intro to Tier I Deliverables	NNPHI
Project Management	Tier A	Webinar	Deep Dive into Deliverables	Explaining Tier A deliverables	NNPHI
Project Management	Tier A	Webinar	tier_a_deliverables_session_1	Slides for the webinar above	NNPHI
Project Management	Tier A	Webinar	Tier A Kickoff	Webinar to orient Tier A to the program	Trailhead
Project Management	Tier A	Webinar	Tier A Kickoff	Slides for the webinar above	Trailhead
Project Management	Cycle 3	Webinar	Tier II Kickoff	Webinar to welcome Cycle 3 back to the program	Trailhead
Project Management	Cycle 3	Webinar	Tier II Kickoff	Slides for the webinar above	Trailhead
Project Management	Cycle 3	Webinar	Tier II Notes	Finance info included in the webinar	Trailhead
Project Management	Cycle 2	Webinar	Tier III Kickoff	Webinar to welcome Cycle 2 back to the program	Trailhead
Project Management	Cycle 2	Webinar	Tier II Kickoff	Slides for the webinar above	Trailhead
Project Management	Cycle 2	Webinar	Tier II Notes	Finance info included in the webinar	Trailhead
Project Management	Cycle 3	Webinar	Tier II Document Expectations	Webinar to prepare Cycle 3 for Tier II	Trailhead
Project Management	Cycle 3	Webinar	Tier II Expectations_2017	Slides for the webinar above	Trailhead
Project Management	Cycle 3	Webinar	Tier II Expectations_2017	Slides for the webinar above	Trailhead
Project Management	Tier I, Cycle 3	Webinar	Tier I, Cycle 3 November Group Call	Deep dive into recruitment and governance document	NNPHI
Project Management	Tier II, Cycle 2	Webinar	Tier II, Cycle 2 April Group Call	Final Report and Application for Tier III review	NNPHI
Project Management	Tier I, Cycle 3	Webinar	Tier I, Cycle 3 March Group Call	Final Report and Tier II Application	NNPHI
Project Management	Tier I, Cycle 3	Webinar	Tier I, Cycle 3 April Group Call	What to expect in Tier II	NNPHI
Research	Cycle 2	Document/Guide	Research proposals	additional information for putting together a research proposal	HRIA
Research	All Cycles	Document/Guide	SPANISH Ejemplos de preguntas de CER buenas y malas	Resource for webinar above	Trailhead
Research	Cycle 2	Document/Guide	TierII_SPANISH_CERQuestionsOverview_FINAL	SPANISH Guide for completing CER Questions Overview	Trailhead
Research	Cycle 3	Document/Guide	TierI_CER Ideas Guide_FINAL	Guide for creating CER Ideas	Trailhead
Research	Cycle 2	Document/Guide	TierII_CER Question Grid GUIDE_FINAL	Guide for completing CER Question Grid TEMPLATE	Trailhead
Research	Cycle 2	Document/Guide	TierII_CER Questions Overview_FINAL	Guide to drafting CER questions	Trailhead
Research	Cycle 2 & 3	Webinar	CER 101	Intro to CER	HRIA
Research	Cycle 2	Webinar	Elements of a Comprehensive Research Proposal	components to writing a research proposal	HRIA
Research	Tier I, Cycle 2	Webinar	Basics of CER	Webinar presented to Tier I, Cycle 2 awardees at the mid-pt	NNPHI
Research	All Cycles	Webinar	Research 101	Webinar on the basics of research principles	Trailhead
Research	All Cycles	Webinar	Final Presentation	Slides for the webinar above	Trailhead
Research	All Cycles	Webinar	Research 101_Final	Slides for the webinar above	Trailhead
Research	All Cycles	Webinar	Is CER right for me?	Introduction to CER Principles	Trailhead
Research	All Cycles	Webinar	Is CER Right for me	Slides for the webinar above	Trailhead
Research	All Cycles	Webinar	Is CER Right for me	Slides for the webinar above	Trailhead
Research	Cycle 3	Webinar	Research Question Development	How to develop research questions with a partnership	MPHI
Research	Cycle 3	Webinar	Research Question Development Tier II TA September 2017	Slides for the webinar above	MPHI
Research	Cycle 3	Webinar	Research Question Development Tier II TA September 2017	Slides for the webinar above	MPHI
Research	All Cycles	Webinar	SPANISH The PICOTS Framework and Comparative Effectiveness Research	Spanish version of PICOTS webinar	Trailhead
Research	All Cycles	Webinar	SPANISH The PICOTS Framework and Comparative Effectiveness Research	Slides for the webinar above	Trailhead
Research	All Cycles	Webinar	SPANISH The PICOTS Framework and Comparative Effectiveness Research	Slides for the webinar above	Trailhead
Research	Cycle 3	Webinar	Using Research Methods in Community & Patient Engaged Research	Research methods webinar	Trailhead
Research	Cycle 3	Webinar	Using Research Methods_Tier I	Slides for the webinar above	Trailhead

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Research	Cycle 3	Webinar	Using Research Methods_Tier I	Slides for the webinar above	Trailhead
Research	Cycle 2	Webinar, handouts	CER Questions	development of CER questions	HRiA
Research	Cycle 2	Webinar, handouts	Research Methods for CER in Community and Patient-Engaged Projects	PCORI methodology and research methods	HRiA
Research	Cycle 2	Webinar, handouts	Strategies for Prioritizing CER Ideas	activities for group processes to prioritize research topics	HRiA
Research	Cycle 2	Webinar, handouts	Types of Research Funding	Criteria for research funding from other sources	HRiA
Sustainability	All Cycles	Document/Guide	10 Steps to Sustainability Handout	List of steps and tips for sustainability	Trailhead
Sustainability	Cycle 2 & 3	Webinar	Planning for the future	how to sustain partnership	HRiA
Sustainability	Cycle 2	Webinar	Engagement through Sustainability Planning	Sustainability planning -- resources / funding	HRiA
Sustainability	Cycle 2	Webinar	Funding Streams	Resources for accessing diverse funding	HRiA
Sustainability	Cycle 2	Webinar	Maintaining Momentum during Unfunded Times	supporting P2P partnership in-between tiers	HRiA
Sustainability	All Cycles	Webinar	Planning for Partnership Sustainability	Webinar to provide tips for sustaining partnerships	Trailhead, GHPC
Sustainability	All Cycles	Webinar	Planning for Partnership Sustainability	Slides for the webinar above	Trailhead, GHPC
Sustainability	All Cycles	Webinar	Planning for Partnership Sustainability	Slides for the webinar above	Trailhead, GHPC
Sustainability	Cycle 3	Webinar	Maintaining the Momentum during Unfunded Times (Tier I - Tier II Transition)	Maintining Momentum webinar for Cycle 3	Trailhead
Sustainability	Cycle 3	Webinar	Maintaining Momentum during Unfunded Times	Slides for the webinar above	Trailhead
Sustainability	Cycle 3	Webinar	Maintaining Momentum during Unfunded Times	Slides for the webinar above	Trailhead
Sustainability	Cycle 2	Webinar	Maintaining the Momentum during Unfunded Times	Maintining Momentum webinar for Cycle 2	Trailhead
Sustainability	Cycle 2	Webinar	Maintaining Momentum during Unfunded Times	Slides for the webinar above	Trailhead
Sustainability	Cycle 2	Webinar	Maintaining Momentum during Unfunded Times	Slides for the webinar above	Trailhead
Sustainability	Cycle 2	Webinar	How to Allocate & Advocate for Resources (2017)	2017 webinar on allocating recources	Trailhead
Sustainability	Cycle 2	Webinar	How to Best Allocate and Advocate for Resources	Slides for the webinar above	Trailhead
Sustainability	Cycle 2	Webinar	How to Best Allocate and Advocate for Resources	Slides for the webinar above	Trailhead
Sustainability	Cycle 1	Webinar	How to Allocate & Advocate for Resources (2016)	2016 webinar on allocating recources	Trailhead
Sustainability	Cycle 1	Webinar	How to Best Allocate and Advocate for Resources	Slides for the webinar above	Trailhead
Other	All Cycles	Document/Guide	Advocacy Plan Template_BLANK	Template for activity referenced in webinar	GHPC
Other	Cycle 2 & 3	Document/Guide	SPANISH_GuidetoDocsinP2P	Guide with SPANISH Terms for Translated P2P docs and webinars	Trailhead
Other	Cycle 2	Webinar	Grantsmanship & Strategic Planning Specific to Potential Future Funding	Tips to help awardees improve funding	HRiA
Other	Tier A	Webinar	June Tier A Peer Learning Event - Main Room	Recording of the presentation and main room of the session	All TAOs
Other	Tier A	Webinar	June Tier A Peer Learning Event - FacilitatingProcess	Recording of the Facilitating/Process Breakout Session	All TAOs
Other	Tier A	Webinar	Facilitating-Process Breakout Notes	Notes for the above breakout session	All TAOs
Other	Tier A	Webinar	June Tier A Peer Learning Event - Patient-Centered	Recording of the Patient-Centered Breakout Session	All TAOs
Other	Tier A	Webinar	Tier A Peer Learning Event Breakout Notes_Patient Centered	Notes for the above breakout session	All TAOs
Other	All Cycles	Webinar	Introduction to Policy and Practice Research/Advocacy	Intro to advocacy, etc	GHPC
Other	All Cycles	Webinar	Trailhead policy research and advocacy	Slides for the webinar above	GHPC
Other	All Cycles	Webinar	Advocacy Tips - Center for Health Progress	Guest presenter slides for above webinar	GHPC
Other	Tier I, Cycle 3	Webinar	Tier I, Cycle 3 January Group Call	Review the Engagement Rubric and MidProject Goals Check-in	NNPHI
Other	Tier I, Cycle 3	Webinar	Tier I, Cycle 3 February Group Call	PCOR and CER Focus	NNPHI

Appendix D

Links: Resources & More Information

- ❖ Georgia Health Policy Center (GHPC)
<https://ghpc.gsu.edu/>

- ❖ Health Resources in Action (HRiA)
<https://hria.org/>

- ❖ Michigan Public Health Institute (MPHI)
<https://www.mphi.org/>

- ❖ National Network of Public Health Institutes (NNPHI)
<https://nnphi.org/>

- ❖ Trailhead Institute
<http://trailhead.institute/>

- ❖ Partnership development resources
<http://trailhead.institute/resources/tools-for-you>

- ❖ PCORI Pipeline to Proposal Awards
<https://www.pcori.org/funding-opportunities/research-support-funding-opportunities/pipeline-proposal-awards>

- ❖ PCORI Portfolio of Funded Projects
https://www.pcori.org/research-results?f%5B0%5D=field_project_type%3A298