A NEW "PEER" REVIEW: DEVELOPING A PROCESS FOR LIVED EXPERIENCE REVIEW OF AN EVALUATION REPORT

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BACKGROUND

The Massachusetts Health Policy Commission (HPC) is an independent state agency charged with monitoring health care cost trends and making policy recommendations to improve the affordability of health care for all residents of the Commonwealth. The HPC makes investments to support care delivery transformation and innovation that align with the agency's mission to advance a more transparent, accountable, and equitable health care system. The HPC administered a grant program called Cost-Effective Coordinated Care for Caregivers and Substance Exposed Newborns (C4SEN) from 2021-2023. This program was designed to provide comprehensive support to the birthing parent-infant dyad for those with a history of substance used disorder (SUD), particularly opioid use disorder (OUD). After the conclusion of the program, HPC staff analyzed data and authored an evaluation report. The HPC developed and implemented a novel process to incorporate review of the evaluation report manuscript by individuals with lived experience of pregnancy and SUD.

RATIONALE

The evaluation plan from the C4SEN program included a patient experience component featuring interviews and surveys asking about experiences with the program, including SUD stigma. However, the HPC recognized there may also be value in soliciting feedback on stigma and overall accordance with lived experience in the evaluation findings. Incorporating the perspective of those with lived experience is a well-documented practice from equitable evaluation frameworks such as patient and public and involvement or participatory research.[1,2] The HPC included two individuals with lived experience (referred to as "peer reviewers") to review key sections of the program evaluation report and provide feedback.

PROCESS

- **Initial project proposal from staff and feedback and approval from agency**
  - Process specific to individual organization
- **Development of job description, application form, review form**
  - Incorporated agency requirements for selecting, engaging and paying contractors
  - It was determined that reviewers should not have participated in or worked on any of the programs being evaluated in order to reduce any potential concerns around objective review
- **Recruitment**
  - Description of opportunity was distributed to C4SEN grant recipient sites to share with their networks, and to a partner organization working in the maternal health/SUD treatment space
- **Review and selection of applicants**
  - The HPC received three applications for two positions
  - Staff reviewed applications separately then convened to reach consensus on selection of reviewers
- **Onboarding of reviewers**
  - Contract forms completed and signed by reviewers
  - Information shared about timeline and expectations for review
- **Distribution of report sections to peer reviewers**
  - Report sections and feedback form sent via email with 30-day timeline for completion
- **Receipt of feedback and review**
  - Staff reviewed feedback and met to discuss whether it met expectations and any implications of feedback for manuscript
- **Payment of peer reviewers**
  - Peer reviewers submitted invoices for payment, which were processed through typical agency invoice payment systems with checks issued to reviewers
- **Incorporation of feedback into evaluation report**
  - Section in methodology appendix added to describe review and indicate reviewers affirmed findings as presented

KEY CONSIDERATIONS

- **Estimating the length of the report sections to be reviewed and the time expected to be spent**
  - Important to determine both timeline and compensation for review
- **Ensuring individuals could be paid for their time**
  - Compensation should be benchmarked to research rates for this type of work in similar organizations to ensure equity and fairness
  - Consider organizational policies around review and approval of payments
- **Developing process for selection of reviewers**
  - Criteria to assess candidates developed in advance, team reviewed applications separately then came together to discuss and determine selection with documented notes
- **Balancing process requirements and reasonable level of effort for individuals doing this work**
  - Worked to keep forms and requirements clear and straightforward, and requested only the minimum level of personal information necessary
  - Created invoicing template
  - Included maximum word counts on application form to ensure level of effort to apply was appropriate
- **Accommodating reviewer needs in completion of forms/contracts**
  - Access to printer/scanner/fax for these individuals may be limited—accepting electronic forms or using mail may be simplest
  - Provide support and guidance to reviewers who are likely unfamiliar with independent contractor processes
- **Structuring documentation to support feedback**
  - Form asked direct questions about relevance and clarity of findings, consistency with lived experience and stigmatizing language, while also leaving room for more open-ended feedback
  - Included note that feedback and all submitted documents were subject to Massachusetts public records law
  - The HPC reserved the right to request a virtual meeting with reviewers to discuss feedback or ask questions as needed; this was not needed with either reviewer
- **Allowing sufficient time for entire process**
  - Allowing sufficient time for peer reviewers to complete review in light of professional and family obligations is important. Consider holidays and other time-limiting factors (school schedules, etc.)

IMPACT

This process was an important learning experience for program and evaluation staff about the steps necessary to implement a new process in evaluation report development and in the requirements and processes for hiring for a small reviewer role within a state government agency. The team had to develop methods to adhere to state policies while still creating a reasonably streamlined process for individuals working in a temporary capacity. In addition, the feedback from reviewers helped confirm relevance and consistency of findings for individuals with lived experience and provided meaningful assurance that report language was not reinforcing stigma.

FUTURE DIRECTIONS

HPC will consider using this process when developing evaluation reports about programs serving populations whose lived experience may require sensitivity. Other techniques the agency has employed for similar purposes include patient experience committees. Exploring these opportunities and sharing with others in the evaluation space aligns with the goal to center lived experience.

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