

# FINAL STAKEHOLDER COMMUNITY AND OUTREACH CENTER OPERATIONAL FRAMEWORK

OCTOBER 2022

## Agency for Healthcare Research and Quality: Clinical Decision Support Innovation Collaborative (CDSiC)

**Presented by:**

NORC at the University of Chicago

**Presented to:**

Edwin Lomotan

James Swiger

Agency for Healthcare Research and  
Quality

5600 Fishers Lane, Room 06B03

Rockville, MD 20857

---

PROJECT:

Clinical Decision Support Innovation Collaborative

Contract No: 75Q80120D00018

Task Order No: 75Q80121F32003

---

TASK & DELIVERABLE:

Deliverable 2.1: Develop a charter and operational framework for the CDSiC Stakeholder Community and Outreach Center

---

PRESENTED BY

NORC at the University of Chicago

4350 East-West Highway

Suite 800

Bethesda, MD 20814

## Table of Contents

Purpose of Operational Framework.....	1
Stakeholder Center Structure .....	1
Stakeholder Center Planning Committee .....	2
Stakeholder Center Workgroups .....	3
Roles and Responsibilities.....	5
Synergies, Challenges, and Mitigation Strategies .....	7

## Purpose of Operational Framework

The purpose of this Operational Framework is to provide direction for the Stakeholder Community and Outreach Center (the Stakeholder Center) of the Clinical Decision Support Innovation Collaborative (CDSiC) regarding process and day-to-day matters.

The Stakeholder Center will:

- Establish four stakeholder-led Workgroups focused on key topic areas: 1) Clinical Decision Support (CDS) Outcomes and Objectives, 2) Scaling, Measurement and Dissemination of CDS, 3) Trust and Patient-Centeredness, and 4) CDS Standards and Regulatory Frameworks.
- Develop 12 high-quality, written products across the four Workgroups that will inform the activities of CDSiC and support the external community in advancing the design, development, implementation, and measurement of CDS.
- Provide thought leadership across CDSiC in conjunction with the CDSiC Steering Committee to inform the direction of the collaborative and its work products.

This document describes the Stakeholder Center's structure and processes, specifically the composition of the Stakeholder Center Planning Committee and the Center's four Workgroups as well as scheduling, reporting, and workflows of Stakeholder Center activities.

The primary audiences of this framework are the Agency for Healthcare Research and Quality (AHRQ), the Stakeholder Center leadership, and the Stakeholder Center Planning Committee. The Framework will be ratified by the Project Directorate and the Stakeholder Center Planning Committee. The Framework will be publicly available on the CDSiC website.

## Stakeholder Center Structure

The Stakeholder Center will consist of three components: 1) Center leadership, including a Stakeholder Center Planning Committee, that will provide oversight, 2) four topic-focused Workgroups that will be dedicated forums for stakeholder engagement and product development, and 3) additional support staff that will ensure the timely completion of key Center activities.

**Stakeholder Center Leadership.** Priyanka Desai from NORC at the University of Chicago (NORC) and Elizabeth Cope from AcademyHealth will co-lead the Stakeholder Center. They will work collaboratively with Workgroup leadership to ensure that each Workgroup provides meaningful input to CDSiC activities and creates products to help advance CDS development and implementation. Desai and Cope, along with CDSiC Principal Investigator (PI) Prashila Dullabh, Co-Investigators Dean Sittig and David Lobach, Workgroup Chairs and Associate Leads (see below), and AHRQ project leadership will form the Stakeholder Center Planning Committee.

**Workgroup Structure and Leadership.** Each Workgroup will have up to 15 members, consisting of two Workgroup leaders (Chair and Associate Lead) and volunteer members. Each Workgroup will have

a dedicated Chair, Associate Lead, and Support, which are listed in Exhibit 1. The CDSiC PI, Co-Investigators, and Stakeholder Center leadership will identify appropriate volunteer members. Upon approval by AHRQ, volunteer members will be solicited for participation by Stakeholder Center leadership.

### Exhibit 1. Workgroup Leadership

Workgroup	Proposed Leadership
<b>CDS Outcomes and Objectives</b>	<ul style="list-style-type: none"> <li>■ <b>Chair: Gilad Kuperman, MD, PhD (Memorial Sloan Kettering Cancer Center)</b></li> <li>■ <b>Associate Lead: Karen Nanji, MD, MPH (Massachusetts General Hospital, Harvard Medical School)</b></li> <li>■ Support Lead: Elizabeth Cope, PhD, MPH (AcademyHealth)</li> </ul>
<b>Scaling, Measurement, &amp; Dissemination of CDS</b>	<ul style="list-style-type: none"> <li>■ <b>Chair: Jerome Osherooff, MD, FACP, FACMI (TMIT Consulting)</b></li> <li>■ <b>Associate Lead: Allison McCoy, PhD, FAMIA (Vanderbilt University)</b></li> <li>■ Support Lead: Krysta Heaney-Huls, MPH (NORC)</li> </ul>
<b>Trust and Patient-Centeredness</b>	<ul style="list-style-type: none"> <li>■ <b>Chair: Tonya Hongsermeier, MD, MBA (Elimu Informatics)</b></li> <li>■ <b>Associate Lead: Angela Dobes, MPH (Crohn's &amp; Colitis Foundation)</b></li> <li>■ Support Lead: Rachel Dungan, MSSP (AcademyHealth)</li> </ul>
<b>CDS Standards and Regulatory Frameworks</b>	<ul style="list-style-type: none"> <li>■ <b>Chair: Aziz Boxwala, MD, PhD, FACMI (Elimu Informatics)</b></li> <li>■ <b>Associate Lead: Rachel Richesson, PhD, MPH, MS (University of Michigan)</b></li> <li>■ Support Lead: Janna Gordon, PhD (NORC)</li> </ul>

**Team Support Staff.** Additional support staff will work with Workgroup leadership to help with meeting planning and logistics as well as product development. They will also communicate regularly with Stakeholder Center leads Desai and Cope about potential operational challenges or concerns.

## Stakeholder Center Planning Committee

**Planning Committee Primary Function.** The Stakeholder Center Planning Committee (Desai and Cope, PI Dullabh, Co-Investigators Sittig and Lobach, Workgroup Chairs and Associate Leads, and AHRQ leadership) will provide input on the overall strategic direction and coordination of the Stakeholder Center as well as the collaborative as a whole. This input will involve:

- Meeting regularly to provide strategic guidance and direction on key decisions that relate to the Workgroups, the CDSiC Innovation Center, or the collaborative.
- Facilitating cross-Workgroup synergy and coordination through regular communication.
- Providing strategic input into Operations Center and Innovation Center activities based on Workgroup activities.

**Planning Committee Meetings and Communications.** The Planning Committee will convene virtually every other month to facilitate regular communication. The Planning Committee will schedule ad hoc

meetings as needed. Desai and Cope will moderate each meeting. In between meetings, the Planning Committee will use the CDSiC Confluence Website to facilitate asynchronous work. As needed, Desai and Cope will provide a bulleted list of updates via email to the Planning Committee to highlight future meeting agenda items.

Before each meeting, Desai and Cope will circulate a draft agenda and materials (e.g., slide decks, background documents) at least two business days prior. During the meetings, PI Dullabh and/or Co-Investigators will provide Steering Committee and Innovation Center Planning Committee updates to facilitate cross-communication among CDSiC activities. Within 14 days of each meeting, Desai and Cope will provide AHRQ with meeting minutes and materials.

## Stakeholder Center Workgroups

**Workgroups Primary Function.** Through the Workgroups, the Stakeholder Center will create forums to engage a diverse range of perspectives within the CDS ecosystem. The four Workgroups will provide CDSiC's thought leadership—developing product ideas, developing written products which may include frameworks and guidance that advance CDS for the broader community, collaborating with the CDSiC Steering Committee to inform CDSiC activities and the collaborative's strategic direction, and providing input to projects the CDSiC Innovation Center develops. This activity will involve:

- Meeting regularly to provide thought leadership and strategic input to CDSiC, particularly to the Innovation Center.
- Developing products that can inform the work of the Innovation Center and support the external CDS community.

**Workgroup Meetings.** Workgroups will meet twice a month for the first three months and then monthly. The Workgroups will be virtually convened for 60-minute meetings using Zoom or another virtual platform. Chairs and Associate Leads will facilitate the discussion. Workgroups will schedule additional meetings as determined by scope of the products developed by each Workgroup. Between meetings, asynchronous Workgroup collaboration will occur on the CDSiC Confluence site.

NORC team support staff will work with Workgroup leadership to create and distribute agendas at least one day before meetings. For the initial Workgroup meetings, meeting agendas will be set by Stakeholder Center and Workgroup leadership. Across all Workgroups, the first meetings will focus on refining and finalizing ideas for products. All meeting minutes will be taken, distributed to all team leads and available on the project Confluence site to improve communication across teams.

**Workgroup Products.** Collectively, Workgroups will develop a total of 12 written products, which align with the expected level of efforts outlined by AHRQ (i.e., level of effort is 4-6 months [Level 3], 9-11 months [Level 2], or 12-14 month [Level 1] for product development). Workgroups will create three standalone products, each with their own timelines, needs, and challenges. Given that all products need to be completed within a specific timeframe, the products should not be dependent on one another. Products may be synergistic, but they should be independent. Products will be unique to the CDSiC,

capitalizing on the specific strengths of the collaborative and aligning with the mission and vision of the CDSiC.

A product must be a written material of publishable quality (e.g., peer reviewed manuscripts or reports). Potential products may include environmental scans, landscape analyses, gap analyses, prioritized research agendas, lists of evidence-based best practices or recommendations, CDS evaluation frameworks, and CDS measurement frameworks. A product is not a demonstration or research study, new CDS standards, new CDS tools or software, or a dissemination activity. Products will inform the Innovation Center Cores and CDSiC goals, as well as be of utility for external stakeholders in the CDS field.

The target audience for Workgroup products may vary by resource, but broadly include patients/caregivers and their care team, clinicians, CDS researchers, CDS content developers, CDS vendors, policymakers, and payers.

**Product Selection Criteria.** Initial product ideas will be developed by Workgroup leadership, in consultation with other Planning Committee members. Workgroup members and the Planning Committee will narrow and prioritize product ideas using criteria established by CDSiC project leadership in order to select final products. Primary selection criteria include:

- **Workgroup Scope:** Does the product fit within the overall mission and vision of CDSiC as well as the scope and objectives of the Workgroup, as outlined by AHRQ and the Workgroup charter?
- **Need/Gap:** Does the product fill a critical need or gap in CDS that is within the Workgroup's area of focus? Does this product address a need that is not likely to be addressed by other CDS efforts?
- **Feasibility:** Is the product feasible to complete given Workgroup resources, estimated level of effort, and project timelines?
- **Impact:** Will the product have an impact on the field of CDS in the context of the Workgroup's focus? Does the product contribute a new, high-quality, and unique resource(s) to the field of CDS?

In reviewing and finalizing product proposals for AHRQ, the Planning Committee may apply secondary criteria:

- **Opportunity Cost:** What priority areas will this product not address?
- **Uptake:** What is the likelihood this product will be used by the field once disseminated? What is the burden of uptake for this product? How accessible will the product be to intended end-users?

Products will ultimately need to approval from the Stakeholder Center Planning Committee and AHRQ.

**Product Development Workflows.** As each product plan is finalized, Workgroup leadership will work with members to determine roles and responsibilities for each product, assigning Workgroup members tasks or roles based on the scope of the product and the expertise and experience of members.

Product development will be supported by dedicated NORC team staff that will help complete individual tasks for each product (e.g., screening literature) and manage the overall timeline for the product. Product development teams will use the CDSiC Confluence site for asynchronous collaboration and schedule virtual meetings as needed.

In consultation with the Planning Committee, Workgroup leadership will provide guidance and strategic direction for the development of each product developed under their respective Workgroup. Center Leads Desai and Cope will be responsible for quality assurance processes across all developed products.

**Workgroup Reporting.** A summary of Workgroup activities will be included in monthly project reports. In addition, the Stakeholder Center will produce detailed quarterly reports on Workgroup progress that summarize:

- Actions taken by Workgroups since the last report;
- Items the Workgroups are exploring;
- Product development updates;
- Recommendations and next steps for consideration by the Planning Committee, Steering Committee, and AHRQ; and
- Recommendations for Innovation Center projects based on research, data collection, or work products.

Within 14 days of receiving AHRQ comments on the draft quarterly report, the Stakeholder Center will produce a 508-compliant version for posting on the CDSiC website.

**Product Authorship.** Authorship for Workgroup products posted publicly on the CDSiC website as well as any resulting publications will be determined following International Committee of Medical Journal Editors (ICMJE) guidelines.<sup>1</sup> Non-author Workgroup members will be credited as contributors in publicly posted products and included in the acknowledgements of publications.

## Roles and Responsibilities

Each component of the Stakeholder Center will have a distinct role and responsibilities, which are summarized in Exhibit 2:

- Working with the Planning Committee, Desai and Cope will provide operational leadership and establish logistics, expectations, and staffing for each Workgroup. They will also be responsible for overall quality assurance.
- Workgroup leadership will set the overall direction for the development of Workgroup products, facilitate meetings, lead product development, assign roles and responsibilities to members,

---

<sup>1</sup> International Committee of Medical Journal Editors. Defining the Role of Authors and Contributors. Available from: <http://www.icmje.org/recommendations/browse/roles-and-responsibilities/defining-the-role-of-authors-and-contributors.html>



monitor progress, ensure products are developed consistent with proposed timelines and communicate regularly with Stakeholder Center leadership.

- Support staff will work with Workgroup leadership to support meetings and execute all products. They will also ensure that Desai and Cope are aware of any operational concerns.

**Facilitating Communication Across CDSiC Centers.** CDSiC PI Dullabh will be responsible for communicating and coordinating with Desai and Cope to provide updates from the Operations and Innovation Center. Dullabh will also work with Desai, Cope, and Workgroup Chairs to identify items that should be added to the Workgroup agendas, communicate requests for input from the Workgroup members on Innovation Center activities, and coordinate the timely review of any documents by Workgroup members. As needed, Innovation Center leadership will join Workgroup meetings to obtain direct feedback on projects and engage Workgroup leads to help prioritize issues that need to be addressed.

## Exhibit 2. Stakeholder Center Roles and Responsibilities

Role	Responsibilities
<b>Stakeholder Center Leadership</b>	<ul style="list-style-type: none"> <li>■ Contribute to overall strategic direction and coordination of the Stakeholder Center and provide strategic input into Operations Center, Innovation Center, and broader CDSiC activities based on Workgroup activities</li> <li>■ Facilitate cross-Workgroup synergies through regular communication</li> <li>■ Inform Steering Committee, Innovation Center, and AHRQ of Center and Workgroup activities</li> <li>■ Establish Workgroup meeting schedules and private Workgroup collaboration spaces</li> <li>■ Establish consistent expectations and processes for individual Workgroups as well as expectations for timelines and products</li> <li>■ Ensure adequate staffing Workgroup support</li> <li>■ Establish review and quality assurance processes</li> </ul>
<b>Workgroup Leadership (Workgroup Chairs, Associate Leads, and Support Leads)</b>	<ul style="list-style-type: none"> <li>■ Facilitate Workgroup meetings</li> <li>■ Lead product development (e.g., refining ideas, developing outlines and timelines)</li> <li>■ Assigning roles and responsibilities among Workgroup members for products</li> <li>■ Work with NORC team support staff to ensure timely execution and delivery of all products</li> <li>■ Communicate Workgroup needs/challenges to Center Leads</li> </ul>
<b>Workgroup Members</b>	<ul style="list-style-type: none"> <li>■ Participate actively during Workgroup meetings and over asynchronous collaboration platforms</li> <li>■ Inform, plan, and contribute to the development and refinement of Workgroup products</li> <li>■ Complete assigned tasks in consultation with Workgroup leadership</li> <li>■ Provide input on Innovation Center activities</li> <li>■ Assist in disseminating and amplifying the work of CDSiC</li> </ul>
<b>Team Support Staff</b>	<ul style="list-style-type: none"> <li>■ Work with Workgroup leadership to support meetings (e.g., agenda, meeting materials, notes)</li> <li>■ Support the execution of all Workgroup products under the direction of Workgroup leadership (e.g., conduct literature reviews, develop draft reports)</li> <li>■ Communicate with Center Leads about operational concerns</li> </ul>

## Synergies, Challenges, and Mitigation Strategies

To ensure synergy and proactively address potential challenges, the Stakeholder Center Planning Committee will ensure mitigation strategies are in place for all Center activities. These include:

- Regular review and discussion of challenges encountered by Workgroups, using decision-making frameworks to solve problems.
- Regular agenda items for Planning Committee meetings to review and discuss Workgroup activities, challenges encountered, and mitigation strategies.
- Dedicated experienced Workgroup support staff to ensure the smooth operation of all meetings and timely development of products.
- Regular communication with Workgroup members to obtain buy-in and foster continuous engagement and participation.
- Cross-Workgroup and cross-CDSiC discussions to ensure alignment in activities and overall strategic approach.