Stakeholder Community and Outreach Center: Operational Framework – Option Year 1

TASK & DELIVERABLE:

Deliverable 2.1: Deliver Final Revised Operational Framework

PRESENTED BY

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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) Measurement and Outcomes, 2) Implementation, Adoption, and Scaling, 3) Trust and Patient-Centeredness, and 4) CDS Standards and Regulatory Frameworks.
- Develop 11 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) will lead the Stakeholder Center. She 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, 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 20 members, consisting of two Workgroup co-leaders and volunteer members. Additionally, each Workgroup will have a Support Lead. The Workgroup leadership structure is described 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
Measurement and Outcomes	■ **Co-Lead: Polina Kukhareva, PhD, MPH, FAMIA (University of Utah)** ■ **Co-Lead: Mustafa Ozkaynak, PhD, MS (Colorado University)** ■ Support Lead: Rachel Kurtzman, PhD (NORC)
Implementation, Adoption, and Scaling	■ **Co-Lead: Ken Kawamoto, MD, PhD, MHS, FACMI, FAMIA (University of Utah)** ■ **Co-Lead: David Lobach, MD, PhD, MS (Elimu Informatics)** ■ Support Lead: Krysta Heaney-Huls, MPH (NORC)
Trust and Patient-centeredness	■ **Co-Lead: Jessica Ancker, PhD, MPH, FACMI (Vanderbilt University)** ■ **Co-Lead: Angela Dobes, MPH (Crohn's & Colitis Foundation)** ■ Support Lead: Avantika Shah, MPH (NORC)
CDS Standards and Regulatory Frameworks	■ **Co-Lead: Aziz Boxwala, MD, PhD, FACMI (Elimu Informatics)** ■ **Co-Lead: Rachel Richesson, PhD, MPH, MS (University of Michigan)** ■ Support Lead: Desirae Leaphart, MPH, PMP (NORC)

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 Lead Desai about potential operational challenges or concerns.

Stakeholder Center Planning Committee

Planning Committee Primary Function. The Stakeholder Center Planning Committee (Desai, 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 five times throughout the Option Year to facilitate regular communication. The Planning Committee will schedule ad hoc meetings as needed. Desai will moderate each meeting. In between meetings, the Planning Committee will use the CDSiC SharePoint Website to facilitate asynchronous work. As needed, Desai will provide a bulleted list of updates via email to the Planning Committee to highlight future meeting agenda items.

Desai will circulate a draft agenda and materials (e.g., slide decks, background documents) at least one business day 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 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 every other month from October 2023-September 2024. The Workgroups will be virtually convened for 60-minute meetings using Zoom or another virtual platform. Workgroup co-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 SharePoint site.

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

Workgroup Products. Collectively, Workgroups will develop a total of 11 written products, which align with the expected level of efforts outlined by AHRQ (i.e., level of effort is 4-6 months [Level 3] or 9-11 months [Level 2] for product development). The Measurement and Outcomes; Implementation, Adoption, and Scaling; and Trust and Patient-Centeredness Workgroups will each create three standalone products, including two Level 3 and one Level 2 products. Standards and Regulatory Frameworks Workgroup will produce two Level 2 products. Each product has their own development timeline, needs, and challenges. Given that all products must 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 landscape analyses, gap analyses, prioritized research agendas, lists of evidence-based best practices or recommendations, and round table report outs. 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 were scoped by the CDSiC team and proposed to AHRQ, using suggestions from CDSiC partners (e.g., the CDSiC project team, Steering Committee members, Workgroup members, and Stakeholder Center Planning Committee members) at the 2023 CDSiC Annual Meeting and routine Steering Committee and Stakeholder Center Planning Committee meetings, and Workgroup meetings. Workgroup leadership can consult this list of project ideas, and can also contribute ideas of their own. Workgroup members and the Planning Committee will narrow and prioritize product ideas using criteria established by CDSiC project leadership 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?

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

Product Development Workflows. Workgroup leads will draft product proposals using a template provided by the CDSiC team. Proposals will be reviewed and approved by AHRQ. 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 SharePoint 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 Lead Desai 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.[1] 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 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, 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 is aware of any operational concerns.

Facilitating Communication Across CDSiC Centers. CDSiC PI Dullabh will be responsible for communicating and coordinating with Desai to provide updates from the Operations and Innovation

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[1] 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

Center. Dullabh will also work with Desai and Workgroup co-leads 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
Stakeholder Center Leadership	▪ 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 ▪ Facilitate cross-Workgroup synergies through regular communication ▪ Inform Steering Committee, Innovation Center, and AHRQ of Center and Workgroup activities ▪ Establish Workgroup meeting schedules and private Workgroup collaboration spaces ▪ Establish consistent expectations and processes for individual Workgroups as well as expectations for timelines and products ▪ Ensure adequate staffing Workgroup support ▪ Establish review and quality assurance processes
Workgroup Leadership (Workgroup Chairs, Associate Leads, and Support Leads)	▪ Facilitate Workgroup meetings ▪ Lead product development (e.g., refining ideas, developing outlines and timelines) ▪ Assigning roles and responsibilities among Workgroup members for products ▪ Work with NORC team support staff to ensure timely execution and delivery of all products ▪ Communicate Workgroup needs/challenges to Center Leads
Workgroup Members	▪ Participate actively during Workgroup meetings and over asynchronous collaboration platforms ▪ Inform, plan, and contribute to the development and refinement of Workgroup products ▪ Complete assigned tasks in consultation with Workgroup leadership ▪ Provide input on Innovation Center activities ▪ Assist in disseminating and amplifying the work of CDSiC
Team Support Staff	▪ Work with Workgroup leadership to support meetings (e.g., agenda, meeting materials, notes) ▪ Support the execution of all Workgroup products under the direction of Workgroup leadership (e.g., conduct literature reviews, develop draft reports) ▪ Communicate with Center Leads about operational concerns

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.