Common Metrics Initiative Session

2019 Spring CTSA Program Group Meetings
March 5, 2019
Our Team

- Martin Zand, CLIC PI
- Deborah Ossip, CLIC PI
- Jeanne Holden-Wiltse, Executive Director
- Ann Dozier, Faculty Lead Evaluator
- Raquel Ruiz, Associate Director
- Robert White, Associate Director
- Ann Schwartz, Quality Improvement Specialist
- Sydne Hill, Training Coordinator
# Agenda

<table>
<thead>
<tr>
<th>TIME</th>
<th>TOPIC</th>
<th>PRESENTER(S)</th>
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<tbody>
<tr>
<td>8:30 am - 9:00 am</td>
<td>Registration</td>
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<tr>
<td>9:00 am - 9:05 am</td>
<td>Introductions of CLIC CM Team</td>
<td>Ann Dozier</td>
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<tr>
<td>9:05 am - 9:30 am</td>
<td>CMI 2.0 overview, findings, &amp; feedback</td>
<td>Ann Dozier</td>
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<tr>
<td>9:30 am - 10:30 am</td>
<td>Discussion on the 2.0 feedback</td>
<td>Everyone</td>
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<td>10:30 am - 10:45 am</td>
<td>Break</td>
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<tr>
<td>10:45 am - 11:40 am</td>
<td>Overall CMI Discussion</td>
<td>Everyone</td>
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<td>11:40 am - 12:00 pm</td>
<td>NCATS Updates</td>
<td>Patricia Jones</td>
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<td>12:00 pm</td>
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Goals of this session:

• Provide an overview of the CMI 2.0 Assessment and the key feedback points
• Collect participant comments about selected feedback points to inform next steps of 2.0
• Facilitate discussion on overall CMI activities
• Provide brief updates about key CMI related implementation activities
Poll Question 1

How long has your institution been funded as a CTSA Program?

- 5 years or less
- 3 – 5 years
- 6 + Years
Poll Question 2

Who is in the audience?

- PI
- Evaluator
- Administrator
- NCATS
- Other
Poll Question 3

How many years have you been working at your hub?
- 2 years or less
- 3–5 years
- 6-9 years
- > 10 years
Opportunities for Engagement

• Discussion & comments on 2.0 feedback points
  • Small group discussions at tables
    • Focused on two feedback points
    • Virtual Participants - Use Chat to respond to the questions

• CMI Discussion
  • Small group discussion at tables
    • Focused on hub CMI implementation
    • Large group discussion based on audience questions
    • Use colored index card to submit questions
      • CLIC staff will collect and collate
      • Also open mic
CLIC Goals for the CTSA CMI 2.0

**Nearer term**
- Optimize the CMI processes
- Grow the CMI to new metrics
- Routinely disseminate and discuss aggregated data and findings
- Identify needs of external stakeholders and show how the CTSA Program metrics demonstrate value

**Longer term**
- Increase sustained engagement of individual hubs in the CMI
- Effectively engage consortium in CMI
CMI 2.0 Assessment Objectives

• Take a pulse on how well the metrics are implemented and utilized at each hub
• Engage with the consortium on ways to improve the metrics and the initiative overall
• Determine a process on how to move progressively forward with the initiative with the goal of measuring how well the consortium is doing as a collective across the metrics
CMI 2.0 Assessment Timeline

**Stakeholders:**
- PIs
- Administrators
- CTSA Evaluators
- NCATS
Acknowledgements

• Hub Principal Investigators
• CTSA Evaluators
• Administrators
• NCATS Program Directors
• Tufts University
• Common Metrics Executive Committee
Data Sources

Previous available data
• CTSA Program Evaluator 2018 Survey
• Tufts University CM Implementation Study
• 2017 AEA Think Tank discussion
• Feedback from 2016 Hub report
• Feedback from pilots

Newly collected data
• Evaluator Input –
  • 2018 AEA Session
  • CLIC CM Forum (includes Administrators)
• PI Input
  • Survey via the Steering Committee members & Pods
2.0 Consortium Participation

43 different institutions identified themselves as participating in one or more of these methods.

- AEA (n=16)
- CM Forum (n=13)
- PI's POD Excercise/REDCap (n=30)

Intersection counts:
- 7 institutions are in AEA
- 3 institutions are in CM Forum
- 3 institutions are in the intersection of AEA and CM Forum
- 5 institutions are in PI's POD Excercise/REDCap
- 1 institution is in the intersection of AEA and PI's POD Excercise/REDCap
- 6 institutions are in the intersection of CM Forum and PI's POD Excercise/REDCap
- 18 institutions are in the intersection of all three categories.
Questions to Evaluator Group

1. What are some strategies to integrate CM into local hub evaluation?
   a. What works/does not work; ways CM could be done differently/changed to make this integration easier.

2. What are some priorities (or suggestions) for optimizing the CMI processes?

3. What are priorities to grow new metrics? With an eye to hub needs and/or interests of the Consortium or of CTSA’s external stakeholders.
Question 1 (integration strategies)

Highlight

• Takes resources
• Conflicts with existing tracking; redundancy
• Meaningfulness of metrics
  • is its value to the hub more important than value to the consortium
• Dependent on hub/PI interest priority

How does it inform 2.0?

• Selection criteria/prioritization for future metrics
• Involvement of hubs in metric approval
• Inventory of existing measures to determine ones that could ‘easily’ be shared
Question 2 (CMI optimization)

Highlight
• Criteria to select to metric
• Should metrics meet hub needs or NCATS or both
• Overemphasis on metric vs. metric area

How does it inform 2.0?
• Do we focus on Consortium level metric with hub level focus on related metric area
• Small vs. large groups for feedback
• Align metric with existing group/NCATS goals
Question 3 (new metric)

Highlight
• Some consensus
  • CE
  • Team Science
  • Specific population accrual
  • Workforce beyond T and K
  • Scholarship impact
    • Hub collaboration
    • Practice/population health improvement
  • Learning health care system
    • Integrating innovation

How does it inform 2.0?
• Align metrics across key CTSA strategic foci
PI Pod Exercise Questions

1. This question asks about metrics to measure the progress of the Consortium as a whole. What priority should we give to the development of Consortium level metrics for use by the network and for external stakeholders and what recommendations do you have for Consortium level metrics?

2. Now thinking at the hub level, what should the priority be for the next set of hub level metrics?

3. Hubs have different levels of engagement with Common Metrics, what could be done to add value to the Common Metrics at the hub level?
PI Pod Exercise Questions

1. This question asks about metrics to measure the progress of the Consortium as a whole. What priority should we give to the development of Consortium level metrics for use by the network and for external stakeholders and what recommendations do you have for Consortium level metrics?

KEY MESSAGES

• Development of Consortium level metrics generally supported
  • Focus on the value added of the CTSI
  • Focus on key aspects of translational research
  • Stakeholders/decision-maker priorities (external to CTSA)
  • Can CM for hubs and consortium be the same
  • Can metrics in RPPR be used
PI Pod Exercise Questions

KEY MESSAGES

• Mixed views about number needed; need one for every Core?; concern about cost and value; mine RPPR before expanding; need to be meaningful/impactful
• Many different suggestions proffered; some consensus around Community Engagement, Informatics, Team Science; interest in going back to earlier work (from 2016)
• Ground up process in developing metrics; sunset/rotate metrics

2. Now thinking at the hub level, what should the priority be for the next set of hub level metrics?

3. Hubs have different levels of engagement with Common Metrics, what could be done to add value to the Common Metrics at the hub level?
PI Pod Exercise Questions

KEY MESSAGES

• Improve quality of reports (missing data), better visualizations; comparisons by hub characteristics; data turn around
• Create cross hub synergy (sharing experiences/stories, how do CM contribute to CTSA mission etc.)
• Mixed interest in hub engagement, value of RBA
• Doing both CM and hub evaluation (parallel not integrated); resources required to do both; disproportionate impact on smaller hubs
• Improve reporting software

3. Hubs have different levels of engagement with Common Metrics, what could be done to add value to the Common Metrics at the hub level?
CTSA Program Evaluators
Group: 2018 survey–CM results

- **Metric level concerns**
  - OG definitions (modify metrics)
    - Compare the group of pilots funded by year cohort
    - Limit TTC plans per metric
    - Better assessment of trainees using validated surveys or inventories
  - Systematic review of CM process
  - Application of OG inconsistent
  - Metric meaningfulness
    - Metric refinement/metric evolution
    - Establish benchmarks
  - Problem if metric is outside of CTSI influence
CTSA Program Evaluators
Group: 2018 survey–CM results

- CM Initiative
  - Clarify/strengthen relationship between CM and evaluation
    - Evaluation may be undervalued by CTSI leadership
  - CM redundant with other data collection
    - Drain on resources
    - Mine RPPR as source for metrics, existing data to aggregate about Consortium
  - Clarify value of CM to NCATS and Consortium
  - Metric implementation process improvement
  - Incentivize CM participation
CTSA Program Evaluators
Group: 2018 survey–CM results

• CM Initiative (continued)
  • RBA process valuable/kept people on task
    • Not effective or efficient way to measure and create change
  • Greater involvement of hubs pre metric implementation
    • Create transparent process; hub engagement in metric and operational guidance process

• Number of metrics
  • Flexibility or options for hubs to select metrics (i.e. menu)
  • Sunset process

• Overall usefulness questioned
  • Metrics should focus on Clinical & Translational Research (CTR)
CTSA Program Evaluators
Group: 2018 survey–CM results

• CM reporting
  • Timely return of data to hubs
  • Comparisons across hubs valuable
    • Need to capture complexity of hubs
    • Meaningful stratification
  • Incorporate into existing reporting
  • Data entry clunky
  • Clarify reporting requirements for TTC

• Hub interaction
  • Facilitate hub to hub interactions to share strategies
    • Learning collaboratives
Moving the CMI Forward

From the data collected – Identified feedback points
Key Feedback Points

CMI 2.0 will focus on four areas:

1. Determine overall approach or concept for metrics
2. Establish a plan for development/prioritization of new and refinement of existing metrics
3. Refining Common Metrics processes
4. Common Metrics reporting improvement
Determine overall approach or concept for metrics

• One per core vs. Key aspects of CTR vs. Metrics of what we are doing well vs. Metrics that assess Consortium performance
  • How many are needed; sunset or migration process
  • Address hub issue of managing metrics that fall outside of hub influence
• Create dual use metrics
  • Hub and consortium level
  • Consortium level and external stakeholder
Establish a Plan for Development/Prioritization of New and Refinement of Existing Metrics

• Lay out longer term plan for new metrics
  • Include both short term and long term
    • Provide for development of data systems (i.e. lag time prior to required implementation)

• Modify OG for existing metrics
  • Establish/identify group to 'own' each metric
  • Add contextual variables to reporting
Refining the CM Processes

- Establish criteria and processes to select new metrics
  - Identified group to champion/own metric from pre-implementation, and sustainability implementation
  - Greater transparency/involvement of hubs in metric development/approval process
- How to integrate with hub evaluation activities
  - Minimize redundancies with other reporting (i.e. RPPR)
- Shorten window for quantitative reporting by hubs (e.g. March 31 due date for data from prior year)
Refining the CM Processes (continued)

• Improve consistency of reporting by hubs
  • Adherence to OG

• Strengthen hub-hub interaction opportunities
  • Focus on strategies beyond focus on metric specifics

• Improve data reporting platform
  • Clarify reporting requirements for TTC
  • Identify ways to automate
CM Reporting Improvement

- Timely return of data to hubs
- Comparisons across hubs valuable
  - Include contextual variables
  - Meaningful hub stratification
Small Group Discussion

2.0 Feedback Points:

1. What should be the overarching approach that guides the Common Metrics Initiative?
   a. One per core vs. Key aspects of CTR vs. Metrics of what we are doing well vs. Metrics that assess Consortium performance

2. What are approaches for how to work on metrics that may fall outside a hub's direct influence?
Poll Question 4
Based on your discussion, what is your opinion on the direction of the overarching approach? Please choose your top two.

- One per core
- Key aspects of CTR
- Metrics of what we are doing well
- Metrics that assess Consortium performance
What is next?

• Refine and finalize the identified feedback points
• Final Report to NCATS
  • Phased approach and timeline for feedback implementation
• Once agreed to, proceed with implementation
Index cards to CM team
Break: 15 minutes
Overall CMI Discussions

Questions from Index cards
Additional questions from the mic
Group Discussion

• What has been your most successful strategy with implementing the CMI at your hub? (ex. forming metric teams, data management, developing your TTC, achieving metric strategic management improvements, etc.)
  • What worked? Why?

• Separating the quantitative data reporting from the narrative reporting (TTC plan) would allow for timelier reporting back to hubs, what are your concerns or questions about this change? (ex. March 31\textsuperscript{st} due date for numerical data and August for TTC plans)
Poll Question 5

How important is getting timely reporting of quantitative data?

- Very important
- Moderately important
- Slightly important
- Not at all important
CLIC Forum!

Features

- Categories
  - Allows users to direct posts to a more targeted audience

- Threads
  - Conversations that happen within a category

Questions - clic@clic-ctsa.org
Common Metrics Webpage

Menu Items:
- All Common Metrics
- Common Metrics Reporting
- Common Metrics FAQs
- CM Executive Committee
- Common Metrics Forum
- Submit Story from the Field
Multi-Year CM Report

"New" Common Metrics Initiative page

Released date: Thursday, February 28
Accessible to: PIs, Administrator, Evaluator
2018 CM Data Update

August

Sun | Mon | Tue | Wed | Thu | Fri | Sat
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28  | 29  | 30  | 31  | 1   | 2   | 3
4   | 5   | 6   | 7   | 8   | 9   | 10
11  | 12  | 13  | 14  | 15  | 16  | 17
18  | 19  | 20  | 21  | 22  | 23  | 24
25  | 26  | 27  | 28  | 29  | 30  | 31
NCATS Updates

NCATS Common Metrics Initiative Lead
NCATS Stakeholder Engagement Process

Engage Internal and External Stakeholders:

- NCATS Program Directors
  - Onboarding of new Program Directors re: CM Initiative
  - Developed online training Module for staff
- CM Executive Committee
- CTSA Program Evaluators Committee (Bi-Monthly calls)
- PI Steering Committee
Highlights in Common Metrics Initiative

- 2016 data presented in Spring 2018 - CLIC
- 2015 data presented in Fall 2018 - Tufts
- Informatics Pilot Study Findings & Launch presented in Fall 2018 – CLIC
- Accrual Median Metric Pilot Study presented Fall 2018 – Tufts
- Accrual Metric Development Team finalize Op Guidelines- January 2019
Next Steps

NCATS

- NCATS takes a “Pause”:
  - Selecting new metrics
  - Assembling new metrics development teams
  - Training on metrics not already underway

- Interim Plans and Questions to Explore:
  - NCATS will review multiple sources of data on 3 metrics
  - Decide to keep or revise metric selection process
  - Revisit the end-goal of CM Initiative
Next Steps (2)

Consortium

Accrual Median Metric:

• Accrual Median Metric Operational Guidelines available on CLIC’s website for review:
  • Hubs will have time prepare before submitting to CLIC
  • Those with robust processes and systems can use Op Guideline
  • *Formal reporting begins in 2021*

• Ongoing and transparent communication about systems and processes facilitating accrual data collection:
  • Monthly Hub calls over the coming months

• Engage Consortium’s collective wisdom & expertise through existing communication forums (e.g. PI webinar, Common Metrics Exec Comm, Evaluator’s group, etc.)
Consortium: Interim Activities

- **Informal Discussions**
  - *Measuring engagement*
  - Hub Co-PI
    - University of Southern California/Children’s Hospital Los Angeles
    - Univ of Illinois at Chicago
  - Engagement Researchers
    - Mayo CTSI at MN
    - Vanderbilt University Medical Center
  - Evaluation Researchers
    - Univ of Minnesota
    - Mayo CTSI at AZ

- **Expressions of Interests**
  - *Dissemination, Implementation, Knowledge & Translation sub-group:*
    - developed, refining and testing basic metrics
  - *Team Science Affinity Group:*
    Team Science Competencies
Thank you!!

Accrual Median Metric
Develop Team Members:

• Sundeep Khosla (Mayo)
• Harry Selker (Tufts)
• Tesheia Johnson (Yale)
• Laura Meiners (Mayo)
• J. Carmel Eagan (Indiana)
• Bill Trochim (Cornell)
• Denise Daudeline (Tufts)
• Rhonda Kost (Rockefeller)

8 Accrual Metric Pilot Hubs

Common Metrics Initiative

• Common Metrics Executive Committee
• The CLIC Common Metrics Staff
• NCATS Staff:
  • Pablo Cure
  • Erica Rosemond
  • Clare Schmitt
  • Ken Gersing
  • Cynthia Boucher
  • Lupe Aquino
  • Brittany Crawford
  • Brandin Dechabert
Questions/Answers
Thank you for your contributions!

Contact us @ common_metrics@clic-ctsa.org