Fostering Portfolio Stewardship through a Trial Portfolio Balancing Framework

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**Background**

Disease-based programs (DBPs) and their respective clinical research medical directors (CRMDs) were facing challenges with respect to trial portfolio management and maintaining appropriate CTO resource utilization.

**Goals**

1. Establish a new framework for maintaining trial portfolio balance at both the disease-program and enterprise levels
2. Implement new tools and training to aid CRMDs and CTO leadership optimize trial portfolio management

**Methods**

Retreat (Dec ’22) with CRMDs and CTO Leaders

**Agenda**

- Strategic Alignment Session by Research Sr Executives
- Portfolio Stewardship Educational Session
- Clinical Trials Finance Primer
- Leadership Skills Session (Leading thru Influence) (Led by Organizational Development Office)

**Trial Portfolio Balance Essential Elements**

**Refinements and Next Steps**

- Clinical Research Medical Director Guide v.1

**Trial Portfolio Framework**

- Reference guide developed for current and new CRMDs (and Chairs and CTO Administrative Leaders) to provide clarify on roles & responsibilities and portfolio stewardship principles.

- GI Program developed a dashboard to manage the portfolio framework. GI Shared w/ other DBPs & tool/ format refined & was adopted across all DBPs

**References**


DBPs are asked to align portfolio to these four dimensions, noting where factors are not practical or appropriate for the DBP (ex: Bone Marrow Transplant portfolio will have a larger mix of Cooperative Trials)

CT REV = Clinical Trial Revenue