

Using an Improvement Rounds Workgroup to Maintain a Toolkit Library for Knight Clinical Research Management

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1. Background

The existing toolkit library is a unique collection of documents that are specific to Knight Cancer Research processes and requires an exceptional amount of work to maintain as it is comprised of 500+ work instructions, tools, references, and trainings. Many of the current documents housed in this library are outdated, are duplicative, or are no longer relevant due to changing processes or superseding Knight Cancer Institute or OHSU policies and procedures.

The Improvement Rounds (IR) Workgroup relies on those performing the hands-on work described in the toolkit library to share knowledge, identify flaws or necessary updates in current processes, and to consolidate ideas into standardized documents for ongoing reference by hundreds of research staff.

2. Goals

1. Update relevant toolkit documents in a more routine and timely manner to:
 - a. Reduce overall review timeline
 - b. Increase amount of toolkit documents reviewed within a calendar year
2. Update toolkit documents to accurately reflect processes that occur across the department
3. Standardize processes across teams within CRM for ease of onboarding, cross coverage, and interaction with external entities

3. Solutions and Methods

The IR Workgroup is comprised of (at least) one representative from each disease team within Knight Cancer Research. The group meets for 30 minutes on a biweekly basis to identify toolkit documents in need of review and to work through the process of updating these documents. The overall process requires multiple levels of review – each review group is typically given two weeks to review, and then additional time is allotted to address queries and make updates before sending to the next group.

The process is as follows:

1. IR identifies a document in need of updating and begins process using the track changes and comments functions in Microsoft Word
2. CRM leadership reviews for managerial level changes such as appropriate verbiage and inclusive policies
3. Other teams or departments that maintain oversight over processes outlined in the document will be offered an opportunity to confirm updates are accurate from their perspective

4. Education program then performs the final review of the reconciled document to ensure no lingering questions remain, all links are accurate and functioning, and all required stakeholders have had the opportunity to review

4. Outcomes

Since the re-convening of IR in June 2025, the work group has reviewed and published seven documents within the Toolkits and has also advised on the archive of dozens more outdated/irrelevant documents.

5. Lessons Learned and Future Directions

Hosting brief, 30-minute, biweekly meetings with a pre-planned agenda is manageable for workgroup members' busy schedules. Assigning a small number of (typically three) representatives to each document update allows for thoughtful review of the documents within the allotted timeframe. We let representatives determine what documents they can provide the best insight on during times when their schedule allows for additional projects. Our current plan is to maintain this cadence of meetings and document reviews while being mindful of the additional work members have outside of this workgroup.