

## **Fostering Portfolio Stewardship Through a Trial Portfolio Balancing Framework**

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### **1. Background**

In 2022, Moffitt's Clinical Trials Office (CTO) leadership recognized disease-based programs (DPBs) and their respective clinical research medical directors (CRMDs) were facing challenges with respect to trial portfolio management and maintaining appropriate CTO resource utilization. In response, the center began work on a new initiative to improve DPB/CRMD trial portfolio stewardship, clinical research alignment with institutional goals, and utilization of available resources within the CTO.

### **2. 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

### **3. Solutions and Methods**

Utilizing National Comprehensive Cancer Network (NCCN) survey data, National Cancer Institute (NCI) Cancer Center Support Grant (CCSG) guidance, and Moffitt strategic priorities, essential elements for portfolio balance were established. Based on these essential elements, Moffitt established a portfolio framework that includes four dimensions: (1) trial mix by phase, (2) trial mix by sponsor type, (3) Moffitt scientific leadership role, and (4) financial sustainability (see Figure). Physician leaders critically reviewed the framework and support for this framework was received by stakeholders and center leadership. CRMDs and CTO leaders received a report comparing the current state for each DBP to the portfolio framework guidance during a collaborative retreat. This retreat included education regarding portfolio stewardship, clinical trials financial metrics, and a session on leadership skills (led by Moffitt's Organizational Development Team). Feedback from this session was extremely positive, with a request by CRMDs to hold recurring future collaborative retreats. Following the retreat, a CRMD Resource Guide was developed for current and future CRMDs.

### **4. Outcomes**

All 16 DBPs are actively using the framework to manage their trial portfolios. Adjustments have been made to bring DBP portfolios closer in line with the framework guidance. In addition, the development of this framework has prompted each program to create portfolio dashboards, which are used at program meetings to review portfolio performance and guide portfolio decisions. DBPs now have access to potential subject revenue data, and this is now informing portfolio balancing while providing transparency regarding financial sustainability of the DBPs' clinical research programs. With this information now in one place, several DBPs have initiated creative trial recruitment strategies targeted at both internal and external referral sources to address trial accrual deficiencies. Finally, this framework has provided a platform for forecasting accrual and clinical trial revenue goals for the coming year in a way not previously possible.

### **5. Lessons Learned and Future Directions**

Development and sharing of a trial portfolio framework improved the stewardship of our clinical trial enterprise by providing clinical research leaders with enhanced tools to better understand portfolio performance, alignment with strategic goals, and clinical research financial sustainability.

Moving forward, the tools will be further refined and automated to improve their accessibility to DPBs and CRMDs. Moffitt will use this framework to inform how the institution scales up growth of our clinical trial infrastructure and position us for clinical research excellence in the years to come.

Citation

1. NCCN. “NCCN Best Practices Committee Report on the 2020 NCCN Clinical Research Benchmarking Survey”, December 2020.

Figure

