

# 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

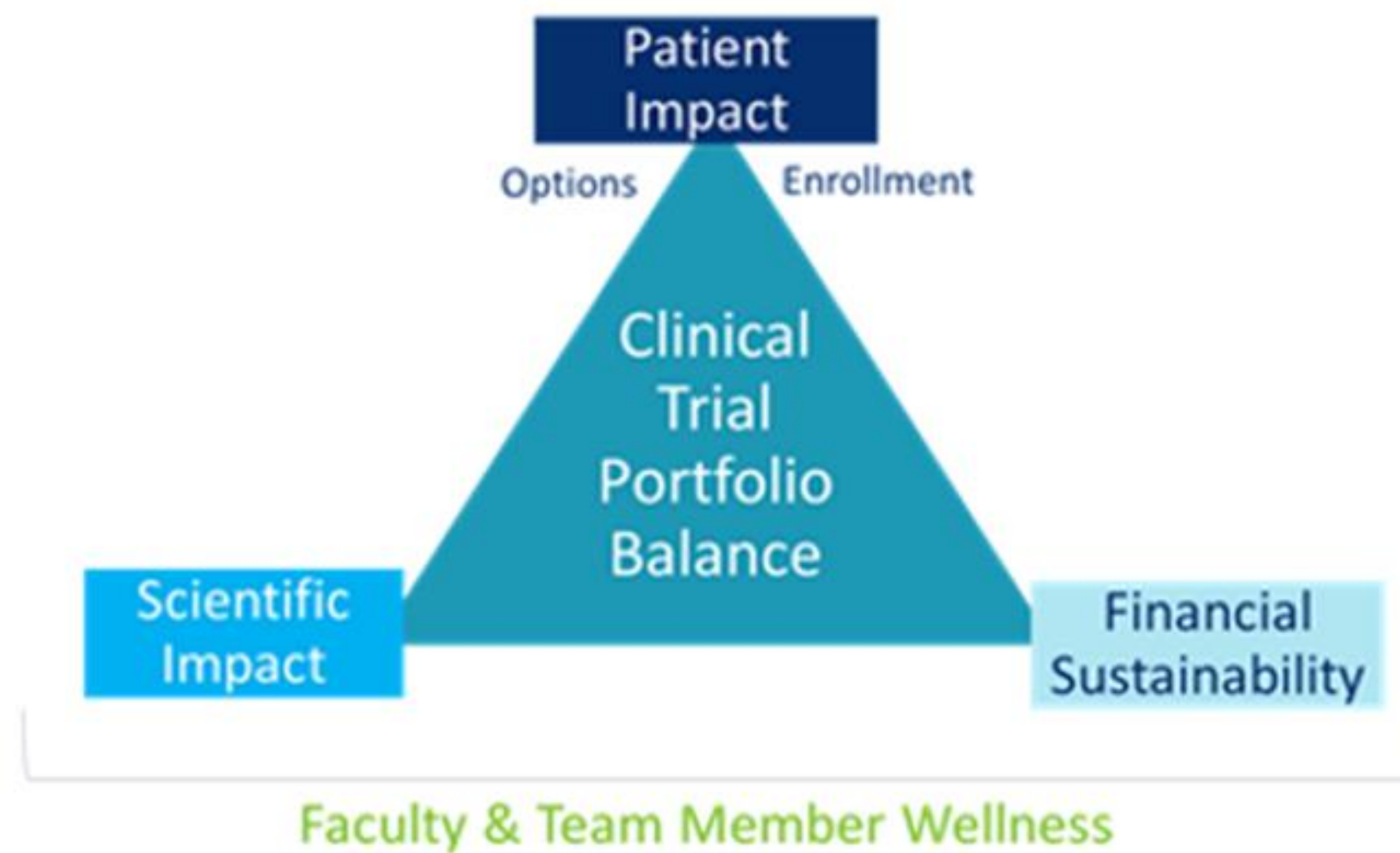
## Methods

Retreat (Dec '22) with CRMDs and CTO Leaders

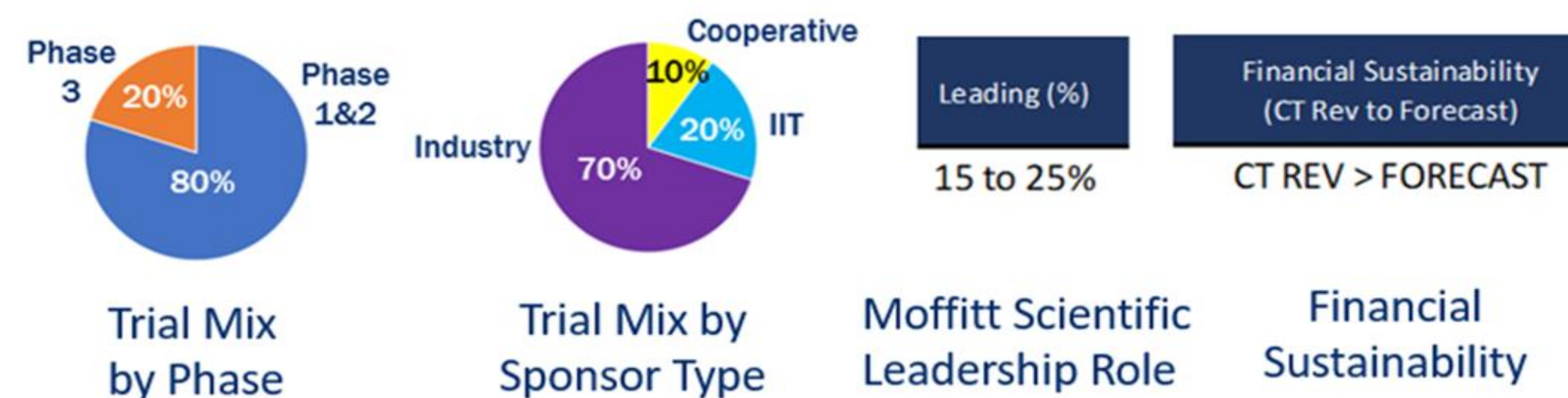
### Agenda

- 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



## Trial Portfolio Framework



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

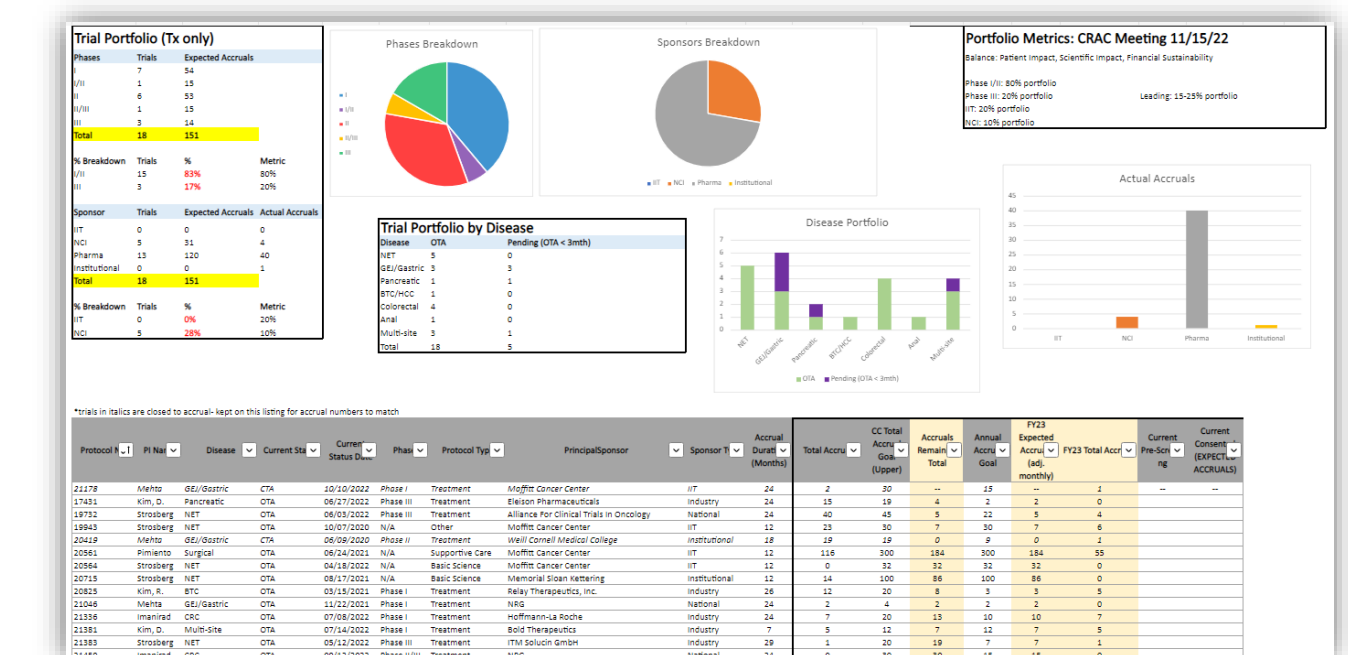
## Refinements and Next Steps

Clinical Research Medical Director Guide v.1



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

360 Portfolio & Ops Dashboard



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

## References

NCCN. "NCCN Best Practices Committee Report on the 2020 NCCN Clinical Research Benchmarking Survey", December 2020.