Portfolio360 – "It All Started with a Spreadsheet"

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Background

Prior State

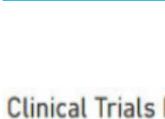
- Scattered, disconnected, and sometimes unavailable access to manage trial portfolios and clinical trials operation.
- Hours spent each month for Managers to pull, splice together data in Excel, and then review data.

Now

- A unified dashboard (built in PowerBI) that provides one stop shop for screening, consenting, accrual, financial, and scientific impact data for each disease program.
- Overall Trial Portfolio metrics available on demand for Senior Leadership as well.

Goals

- Build a single dashboard to measure daily Key Performance Indicators (KPIs) (accrual, financials, scientific impact)
- Provide visibility to leadership, Principal Investigators and CRMDs at any given time.
- Align KPIs and tracking of institutional/CCSG goals.



Management Gro





Framewo

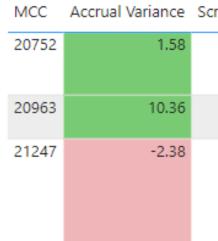
Current f

Expense/F

Weekly Pre

20

Percentag 48.06 % Achieve



Portfolio360 in Review

| Revenue | FYTD Revenue | Revenue Month Forecast | EVTD Forecast | Povopuo EVTD Var | Revenue FYTD Var% |
|---------|----------------|------------------------|----------------|------------------|--------------------|
| loop | PTID Revenue | | PTTD Polecast | Revenue FTTD var | Revenue FTTD val % |
| | \$3,889,987.37 | 364,101.92 | \$3,276,917.28 | \$613,070.09 | 18.71 % |
| | \$3,141,712.93 | 361,028.27 | \$3,249,254.43 | (\$107,541.50) | -3.31 % |
| | \$5,890,590.65 | 347,954.01 | \$3,131,586.09 | \$2,759,004.56 | 88.10 % |
| | \$2,304,223.82 | 332,961.55 | \$2,996,653.95 | (\$692,430.13) | -23.11 % |

| jram P | ortfolio S | Summary | , | | ļ | | |
|---------------------------------|--------------------------------|--------------------------------------|----------------------|--------------------|------------------------|-------------------------|--|
| Filters Fra | mework Filters Phase 1 or 2 | Financial Filters Phase 3 | Cooperative % | IIT % | Revenue FYTD Var | () Revenue FYTD Var% | |
| ork Goal | 80% | 20% | 10% | 20% | CT Revenu | e > Forecast | |
| framework | 78.82 % | 21.18 % | 18 % 14.62 % 29.56 9 | | \$5.53M | 13.79 % | |
| /Revenue Ration 0.87 | | ent of studies on targ | 6 1.02 Ave 109 | rage Current Acc | r 297 | trual vs Goal | |
| rescreening | () Weel | dy Accrual Vs Goal | () Week | dy Consent vs Goal | () # of ineligi | ble patients 🛈 | |
| 06.68 | 8 % | 274.14 9 | % | 244.15 9 | % | 507 | |
| age of studies % red 25 % | 33.89 | %, 50%, 75% or 100% % ved 50 % | 24.64 % | 6 ed 75 % | 12.11 % Achieved 10 | 0 % | |

| creen Failure Rate | Open To Accrual Date | First Enrollment Date | OTA To First Enrollment Days | Accrual within 60 days | Date 25 % | Date 50 % | Date 75 % | Date 100 % |
|--------------------|----------------------|-----------------------|------------------------------|------------------------|------------|------------|------------|------------|
| 11.11 % | 8/23/2021 | 2022-02-25 | 186 | | 2022-07-23 | 2023-06-23 | 2024-05-22 | 2025-04-22 |
| 42.86 % | 12/15/2021 | 2022-03-01 | 76 | | 2023-03-16 | 2024-06-14 | 2025-09-13 | 2026-12-14 |
| 50.00 % | 3/31/2023 | 2023-09-14 | 167 | | 2023-09-29 | 2024-03-30 | 2024-09-28 | 2025-03-30 |

MOFFITT (M)

| ⁻ hases Brea | kdown | | | Sponsors Breakdo | wn | | | | Fiscal Year V |
|--|-------------------------------|------------|--|---|-------------------------|----------------------------|--------|----------------|---|
| Phase2 | Protocol Count | ΟΤΑ | Phase2 % | Sponsor Type | | Count | ΟΤΑ | Sponsor Type % | is 2024 |
| Phase I, I/II, II | 180 | 150 | 76.27 % | | • | 123 | 91 | 52.12 % | is not Protocol Review & Reg |
| Phase III | 45 | 36 | 19.07 % | Industry Institutional | | 71 | 68 | 30.08 % | Affairs, Protocol Support Office, Research Quality & Ec |
| N/A | 43 | 9 | 4.66 % | National | | 32 | 26 | 13.56 % | Fiscal Year Month |
| Total | 236 | 195 | 100.00 % | Externally Peer-Review | hed | 10 | 10 | 4.24 % | is (All) |
| lotal | 230 | 155 | 100.00 % | Total | | | 195 | 100.00 % | Protocol Type is Treatment |
| Status Break | kdown | | | DT4 Breakdown | | | | | Protocol Status is OPEN TO ACCRUAL or SUSPENDED |
| Status | Protocol C | ount | Protocol Status % | Data Table 4 Report Ty | pe Protocol | Count | OTA | Data Table 4 % | Data Table 4 Report V |
| OPEN TO ACCF | RUAL | 195 | 9.10 % | Interventional | | 236 | 195 | 97.12 % | Organization |
| SUSPENDED | | 41 | 1.91 % | Total | | 236 | 195 | 97.12 % | is Moffitt Cancer Center. |
| | | | | | | | | 57.12 /0 | Madfield Internet and Direct |
| Total | | 236 | 11.01 % | - | | | | 51.12 /0 | Moffitt International Plaza (MIP), Moffitt Magnolia (MC |
| Total | | 236 | 11.01 % | Inpatient | | | | 57.12 78 | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO |
| | | 236 | 11.01 % | | ount OTA I | | | 57.12 78 | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO |
| Protocol Typ | | | | Inpatient Inpatient Protocol C | | npatient | % | 57.12 /0 | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC |
| Protocol Typ | | | 11.01 % Protocol Type % | Inpatient | 181 150 | npatient 76.69 | % | 57.12 /0 | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All) |
| Protocol Typ Protocol Type | | | | Inpatient Inpatient Protocol C No | | npatient | % % | 57.12 / | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All) |
| Protocol Typ Protocol Type Treatment | Protocol Count ▼ | ΟΤΑ | Protocol Type % | Inpatient Inpatient No Yes | 181 150 55 45 | npatient 76.69 23.31 | % % | 57.12 /2 | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long. MCC is (All) CRO is True |
| Protocol Typ Protocol Type Treatment Total | Protocol Count T195 195 | OTA 195 | Protocol Type % 97.99 % | Inpatient Inpatient No Yes | 181 150 55 45 | npatient 76.69 23.31 | % % | | (MIP), Moffitt Magnolia (MC) Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All) CRO is True Investigator Initiated |
| Total Protocol Type Protocol Type Treatment Total Sponsors Br Status | Protocol Count T195 195 | OTA 195 | Protocol Type % 97.99 % 97.99 % | Inpatient Inpatient Protocol C No Yes Total | 181 150 55 45 | npatient 76.69 23.31 | % % | Total | (MIP), Moffitt Magnolia (MC Management Group is not CRO COVID-19, CRO Endocrine, CRO Immunotherapy, CRO Long MCC is (All) CRO Investigator Initiated is (All) Sponsor Name is (All) |

Solutions and Methods

- Reports now synched in One Dashboard. \bullet
- Filters allow for review by Fiscal Year (FY) or calendar year, along with numerous filters for deeper drill down and analysis.

Refinements and Next Steps

- Portfolio360 is continuously validated to ensure accurate data reported.
- Refinements made as identified by CRMDs and Administrative Leaders.
- Currently accessing Moffit's data warehouse as source and bringing in data from systems beyond our CTMS.
- Finding new ways to share best practices in the use of the tool.