ORGANIZATIONAL QUALITY IMPROVEMENT

Advancing Relevance, Alignment & Continuous Improvement in Portfolio Programs and MOC

May 13-14, 2015 | Rosemont, IL

To join the discussion on Twitter, please use #MOCPortfolio
WELCOME

On behalf of the American Board of Medical Specialties (ABMS), the ABMS Multi-Specialty Portfolio Approval Program (Portfolio Program) and the American Board of Pediatrics (ABP) Portfolio Program, we welcome you to the second Forum on Organizational Quality Improvement: Advancing Relevance, Alignment & Continuous Improvement in Portfolio Programs and MOC. Our invitees include individuals from ABMS Member Boards (20 boards are currently participating in the Portfolio Program), 42 Portfolio Program Sponsor organizations, 35 Pediatric Portfolio Program Sponsor organizations, and individuals from quality driven organizations that have applied or are considering applications to the Portfolio Program (over 150). The size of this year’s event reflects the rapidly increasing number of Portfolio Program sponsors, up 37% year-over-year.

During the next two days, our outstanding panelists will share how they have developed, implemented, and gained leadership support for their Portfolio Programs. They will also lead discussions on building a meaningful physician experience and expanding diplomate participation in organizational quality and performance improvement efforts. In the Forum’s interactive sessions, you will engage with your peers and explore innovations including data sharing/benchmarking, calculating program ROI, forming research collaborations and much more. Don’t miss presentations from the inaugural class of ABMS Visiting Scholars Program recipients, who will describe their work and talk with you about the potential relevance to your organizations. You will also meet our physician scholars and many other key individuals from Portfolio Program sponsors at the Poster Session and Welcome Reception on Wednesday evening.

The many benefits of the Portfolio Program emanate from its ability to align quality improvement with MOC/continuing certification through activities that are relevant and meaningful to physicians in their daily practices. The Program’s growth rate is a reflection of this strength. We are committed to the Portfolio Program and your success, and we hope you enjoy the Forum, the networking and the learning outcomes.

David W. Price, MD, FAAFP, FACEHP
Senior Vice President, ABMS Research and Education Foundation
Director, ABMS Multi-Specialty Portfolio Approval Program

Virginia A. Moyer, MD, MPH
Vice President for Maintenance of Certification and Quality
American Board of Pediatrics (ABP)
Board of Directors Chair
ABMS Multi-Specialty Portfolio Approval Program

Lois Margaret Nora, MD, JD, MBA
President and Chief Executive Officer
American Board of Medical Specialties
CALL FOR PORTFOLIO REVIEWERS

The ABMS Multi-Specialty Portfolio Approval Program seeks qualified individuals to review initial applications from a broad spectrum of hospitals and health systems interested in participating in MOC/continuing certification activities. These individuals may also review progress reports from Portfolio Program sponsor organizations. Physicians, and other health care professionals with QI experience, are eligible to apply for reviewer positions. For more information, visit mocportfolioprogram.org or contact dprice@abms.org.

Poster Session and Welcome Reception

May 13, 2015
5:30 PM – 7:00 PM
Guggenheim 3

Join us at our Wednesday Poster Session and Welcome Reception to learn and network with other Forum attendees. Appetizers and beverages will be served.

WHAT YOU LEARN
Selected QI Forum participants share their organizations’ best practices, research, and scholarship in organizational quality improvement and MOC activities.

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The Forum on Organization Quality Improvement (QI Forum) sessions are meant to be interactive. This format provides an opportunity to share your organization’s success as well as challenges. The learning exchange, facilitated by experienced Portfolio Program and Pediatric Portfolio Program participants, will help improve, problem solve, and advance your quality improvement efforts.

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<td>7:00 AM - 7:45 AM</td>
<td><strong>Breakfast</strong>&lt;br&gt;Guggenheim 3</td>
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<td>8:00 AM - 8:45 AM</td>
<td><strong>Welcome</strong>&lt;br&gt;MOC 2015 and the Consistency Project: Implications for Partners in Quality&lt;br&gt;<strong>SPEAKER:</strong> Lois Margaret Nora, MD, JD, MBA, President and CEO, American Board of Medical Specialties&lt;br&gt;Guggenheim 1 and 2</td>
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<td>8:45 AM - 9:00 AM</td>
<td><strong>Break</strong></td>
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<td>9:00 AM - 10:15 AM</td>
<td><strong>BREAKOUT SESSION 1 - Operational Nuts and Bolts - How You Make It Work</strong>&lt;br&gt;(Recommend Attendance by Year)&lt;br&gt;<strong>FACILITATOR:</strong> Barbara Ackerman, RN, MPH, CPHQ&lt;br&gt;Quality &amp; Patient Safety Institute&lt;br&gt;Cleveland Clinic&lt;br&gt;Prado 1&lt;br&gt;<strong>FACILITATOR:</strong> Christine Taddy Bloom, MPH&lt;br&gt;Office of Continuing Medical Education &amp; MOC&lt;br&gt;Portfolio Program&lt;br&gt;HealthPartners/Park Nicollet Institute&lt;br&gt;Field Room&lt;br&gt;<strong>FACILITATORS:</strong> Debra Jensen&lt;br&gt;Seattle Children’s Hospital&lt;br&gt;Jan E. Patterson, MD, MS&lt;br&gt;University of Texas Health Science Center at San Antonio&lt;br&gt;Guggenheim 1 and 2</td>
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<tr>
<td>10:15 AM - 10:45 AM</td>
<td><strong>Break</strong></td>
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<td>10:45 AM - 12:00 PM</td>
<td><strong>BREAKOUT SESSION 2 - Portfolio Program Stories and Narratives; Lessons Learned</strong>&lt;br&gt;(Open)&lt;br&gt;<strong>Engaging Physicians and Increasing Participation</strong>&lt;br&gt;<strong>FACILITATOR:</strong> Bruce A. Nitsche, MD&lt;br&gt;Virginia Mason Medical Center&lt;br&gt;Guggenheim 1 and 2&lt;br&gt;<strong>Aligning Different Requirements Through Institutional Portfolio Program Structure (OPPE, PQRS, PCMH, Credentialing)</strong>&lt;br&gt;<strong>FACILITATOR:</strong> Peggy Paulson, MS&lt;br&gt;Mayo School of Continuous Professional Development&lt;br&gt;Field Room&lt;br&gt;<strong>Quality, Education (CME/CPD) and Research Collaborations</strong>&lt;br&gt;<strong>FACILITATOR:</strong> Karen E. Heiser, PhD&lt;br&gt;Nationwide Children’s Hospital&lt;br&gt;Prado 1&lt;br&gt;<strong>Publication and Dissemination of Quality Improvement Efforts</strong>&lt;br&gt;<strong>FACILITATOR:</strong> R. Van Harrison, PhD&lt;br&gt;University of Michigan Medical School&lt;br&gt;Prado 2</td>
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<td>12:00 PM - 1:00 PM</td>
<td><strong>Affinity Table Lunch (Discussion)</strong>&lt;br&gt;What is your organization’s biggest Portfolio Program success? Why was it successful?&lt;br&gt;What is your organization’s biggest Portfolio Program challenge? How have you addressed it?&lt;br&gt;<strong>Tables:</strong>&lt;br&gt;• Academic Medical Centers&lt;br&gt;• Portfolio Program Reviewers&lt;br&gt;• Health Systems&lt;br&gt;• Hospitals&lt;br&gt;Guggenheim 3</td>
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<td>1:00 PM - 2:15 PM</td>
<td>BREAKOUT SESSION 3 - Portfolio Program Stories and Narratives; Lessons Learned (Open)</td>
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## THURSDAY, MAY 14, 2015

### 7:00 AM - 7:45 AM

**Breakfast**  
Guggenheim 3

### 7:45 AM - 8:00 AM

**Welcome and Introduction to Day 2**  
**SPEAKER:**  
David Price, MD, FAAFP, FACEHP, Senior Vice President, American Board of Medical Specialties Research and Education Foundation; Director, ABMS Multi-Specialty Portfolio Approval Program  
Guggenheim 1 and 2

### 8:00 AM - 8:45 AM

**Gaining Successful Organizational Leadership Support and Buy-in Within a Portfolio Sponsor Organization**  
**SPEAKERS:**  
Richard E. McClead, Jr., MD, MHA, Associate Chief Medical Officer, Nationwide Children’s Hospital; Professor Emeritus, Pediatrics, The Ohio State University College of Medicine  
Carla M. Pugh, MD, PhD, Susan Behrens Professor of Education and Patient Safety, Department of Surgery; Clinical Director, MOC Portfolio Program and Simulation Program; Associate Professor, Industrial and Systems Engineering, University of Wisconsin  
Guggenheim 1 and 2

### 8:45 AM - 9:00 AM

**Break**

### 9:00 AM - 10:15 AM

**BREAKOUT SESSION 4 - Portfolio Program Data and Information (Open)**

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<tr>
<th>What Kind Of Information Do We Need From Each Other?</th>
<th>Data – Mining and Sharing Across Organizations</th>
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<th>Choosing Measures for Pediatric Quality Improvement</th>
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| **PANEL:**  
Morris J. Blachman, PhD, FACEHP  
University of South Carolina School of Medicine - Palmetto Health  
Linda Caples, MBA  
Medical College of Wisconsin  
Wallace E. Jones Jr., MLD  
American Board of Ophthalmology | **FACILITATOR:**  
Lisa Hebert, RD, MHS, PA-C  
Carolinas HealthCare System | **FACILITATOR:**  
Grant Greenberg, MD, MHSA, MA  
University of Michigan Health System | **FACILITATOR:**  
Virginia A. Moyer, MD, MPH, Vice President for Maintenance of Certification and Quality, American Board of Pediatrics |
| Prado 2 | Prado 1 | Guggenheim 1 and 2 | Field Room |

### 10:15 AM - 10:30 AM

**Break**
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<td>10:30 AM - 11:45 AM</td>
<td><strong>BREAKOUT SESSION 5 - Portfolio Program Data and Information (Open)</strong></td>
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<tr>
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<td>What Kind Of Information Do We Need From Each Other? Data – Mining and Sharing Across Organizations</td>
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<td>FACILITATOR: Lisa Hebert, RD, MHS, PA-C Carolinas HealthCare System</td>
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<td>FACILITATOR: Grant Greenberg, MD, MHSA, MA University of Michigan Health System</td>
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<td>11:45 AM - 12:00 PM</td>
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<td>12:00 PM - 12:30 PM</td>
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<td>FACILITATOR: Lois Margaret Nora, MD, JD, MBA, President and CEO, American Board of Medical Specialties</td>
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<td>12:30 PM - 1:15 PM</td>
<td><strong>Adjourn General Meeting</strong></td>
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<td>Box Lunch pickup for departing non-pediatric attendees</td>
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<td><strong>Pediatric Portfolio Program Lunch</strong></td>
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<td><strong>American Board of Pediatrics Update</strong></td>
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<td>SPEAKER: Virginia A. Moyer, MD, MPH, Vice President for Maintenance of Certification and Quality, American Board of Pediatrics; Board of Directors Chair, ABMS Multi-Specialty Portfolio Approval Program</td>
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<td>Guggenheim 1 and 2</td>
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<td>1:15 PM - 2:15 PM</td>
<td><strong>Pediatrics Portfolio Program Sponsor Stories</strong></td>
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<td>SPEAKERS: Susanna A. McColley, MD, Associate Director, Cystic Fibrosis Center, Division of Pulmonary Medicine, Ann &amp; Robert H. Lurie Children’s Hospital of Chicago; Jennifer Russell, MHSA, Program Manager, Provider Performance Measures, James M. Anderson Center for Health Systems Excellence, Cincinnati Children’s Hospital Medical Center; April M. Taylor, MS, MHA, CPHQ, CPPS, Director, Quality and Patient Safety CHCA, The Children’s Hospital of Philadelphia</td>
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<td>Guggenheim 1 and 2</td>
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<tr>
<td>2:30 PM</td>
<td><strong>Adjourn Pediatric Portfolio Program</strong></td>
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WELCOME
MOC 2015 and the Consistency Project: Implications for Partners in Quality
8:00 AM – 8:45 AM
Guggenheim 1 and 2
PRESENTER:
Lois Margaret Nora, MD, JD, MBA, American Board of Medical Specialties
WHAT YOU LEARN
This keynote presentation and discussion will cover the MOC 2015 Standards, the ABMS Consistency Project, and the critical role that the Organizational Sponsors and the Portfolio Program play in both efforts.
• How ABMS Member Boards are working with one another to achieve greater consistency in their MOC programs and meet the goals outlined in the 2015 MOC Standards.
• How the work of Portfolio Sponsors can substantially help the evolution of MOC as well as continue to help their own organizations.

BREAKOUT SESSION 1
Operational Nuts and Bolts – How You Make It Work
9:00 AM – 10:15 AM
TARGETED CONCURRENT SESSIONS AND FACILITATORS:
Potential Sponsors (0 years)
Prado 1
Barbara Ackerman, RN, MPH, CPHQ, Quality & Patient Safety Institute, Cleveland Clinic
New Sponsors (less than 2 years)
Field Room
Christine Taddy Bloom, MPH, Office of Continuing Medical Education & MOC Portfolio Program, HealthPartners/Park Nicollet Institute
Established Sponsors (more than 2 years)
Guggenheim 1 and 2
Debra Jensen, Seattle Children’s Hospital
Jan E. Patterson, MD, MS, University of Texas Health Science Center at San Antonio
WHAT YOU LEARN
The session identifies common challenges that Portfolio Sponsors face. Each topic will involve group discussion that is facilitated by experienced Portfolio Program participants and appropriate to attendees’ program experience level. Topics may include:
• Managing the attestation process
• Getting paperwork from organizational project leads in a timely manner
• How to get started once approved (new sponsor topic)
• Other program management tools
• Communication tips – Portfolio Sponsor communication regarding MOC and value proposition to physicians

BREAKOUT SESSION 2
Portfolio Program Stories and Narratives: Lessons Learned
10:45 AM – 12:00 PM
Engaging Physicians and Increasing Participation
Guggenheim 1 and 2
FACILITATOR:
Bruce A. Nitsche, MD, Virginia Mason Medical Center
WHAT YOU LEARN
Learn approaches that help engage physicians in organizational quality efforts. Share ‘best practice’ talking points to help physicians see how program involvement is relevant and meaningful to their practice and more than a check-box requirement.
Aligning Different Requirements Through Institutional Portfolio Program Structure (OPPE, PQRS, PCMH, Credentialing)
Field Room
FACILITATOR:
Peggy Paulson, MS, Mayo School of Continuous Professional Development
WHAT YOU LEARN
Learn how the Portfolio Program at your institution can help physicians and organizations meet several different requirements: OPPE, NCQA, Primary Care Medical Home Designation, Credentialing Requirements and more.
Quality, Education (CME/CPD) and Research Collaborations
Prado 1
FACILITATOR:
Karen E. Heiser, PhD, Nationwide Children’s Hospital
WHAT YOU LEARN
Learn how quality and performance improvement, CME/CPD, and research units can collaborate/work synergistically through an institutional portfolio program to develop and evaluate improvement efforts.
Publication and Dissemination of Quality Improvement Efforts
Prado 2
FACILITATOR:
R. Van Harrison, PhD, University of Michigan Medical School
WHAT YOU LEARN
Obtain tips on developing ‘scholarly products’ (presentations and papers) describing the implementation and outcomes of an institutional portfolio program.
Affinity Table Lunch
12:00 PM – 1:00 PM
Guggenheim 3

WHAT YOU LEARN
What is your organization’s biggest Portfolio Program success? Why was it successful? What is your organization’s biggest Portfolio Program challenge? How have you addressed it? Tables are: Academic Medical Systems, Hospitals, Health Systems, and Portfolio Program Reviewers.

Breakout Session 3
Portfolio Program Stories and Narratives: Lessons Learned
1:00 PM – 2:15 PM

Engaging Physicians and Increasing Participation
Guggenheim 1 and 2
FACILITATOR:
Bruce A. Nitsche, MD, Virginia Mason Medical Center

WHAT YOU LEARN
Learn approaches that help engage physicians in organizational quality efforts. Share ‘best practice’ talking points to help physicians see how program involvement is relevant and meaningful to their practice and more than a check-box requirement.

Aligning Different Requirements Through Institutional Portfolio Program Structure (OPPE, PQRS, PCMH, Credentialing)
Prado 1
FACILITATOR:
Peggy Paulson, MS, Mayo School of Continuous Professional Development

WHAT YOU LEARN
Learn how the Portfolio Program at your institution can help physicians and organizations meet several different requirements: OPPE, NCQA, Primary Care Medical Home Designation, Credentialing Requirements and more.

Quality, Education (CME/CPD) and Research Collaborations
Field Room
FACILITATOR:
Karen E. Heiser, PhD, Nationwide Children’s Hospital

WHAT YOU LEARN
Learn how quality and performance improvement, CME/CPD, and research units can collaborate/work synergistically through an institutional portfolio program to develop and evaluate improvement efforts.

Publication and Dissemination of Quality Improvement Efforts
Prado 2
FACILITATOR:
R. Van Harrison, PhD, University of Michigan Medical School

WHAT YOU LEARN
Obtain tips on developing ‘scholarly products’ (presentations and papers) describing the implementation and outcomes of an institutional portfolio program.

Panel: Meaningful Diplomate Participation in MOC
2:30 PM – 3:30 PM
Guggenheim 1 and 2
MODERATOR:
David W. Price, MD, FAAFP, FACEHP, American Board of Medical Specialties

PANELISTS:
Robert J. Birnbaum, MD, PhD, Partners Healthcare
Virginia A. Moyer, MD, MPH, American Board of Pediatrics
Lindsey A. Safford, BBA, Marshfield Clinic

WHAT YOU LEARN
How are organizations defining meaningful participation in their activities? What are ABMS Member Boards looking for? A primary goal of this session is to develop a toolkit for institutions and boards that can be used to define and implement meaningful physician engagement in quality and performance improvement.

ABMS Visiting Scholars Presentations (see page 19)
4:00 PM – 5:00 PM
Guggenheim 1 and 2
FACILITATOR:
Sheldon D. Horowitz, MD, American Board of Medical Specialties

PRESENTER SCHOLARS:
Improving Multidisciplinary Patient Handover
Iahn Gonsenhauser, MD, MBA, Wexner Medical Center, The Ohio State University

Variability in Medicare Utilization and Payment Among Urologists
Joan S. Ko, MD, Johns Hopkins University

Identify and Intervene with Emergency Department Frequent Users
Michelle Lin, MD, MPH, Brigham and Women’s Hospital, Harvard Medical School

Embracing Educational Theory to Improve Care: Development of Part II and IV MOC Activities for Lifelong Learning and Practice Improvement
Daniel J. Schumacher, MD, MEd, Boston University School of Medicine

Surgeon-Specific Reporting: Merging Quality Improvement with Professional Development
Stephanie Yi, MD, Houston Methodist Hospital
Welcome and Introduction to Day 2
7:45 AM – 8:00 AM
Guggenheim 1 and 2
David W. Price, MD, FAAFP, FACEHP, American Board of Medical Specialties

Gaining Successful Organizational Leadership Support and Buy-In Within a Portfolio Sponsor Organization
8:00 AM – 8:45 AM
Guggenheim 1 and 2
PRESENTERS:
Richard E. McClead, Jr., MD, MHA, Nationwide Children’s Hospital, The Ohio State University College of Medicine
Carla M. Pugh, MD, PhD, University of Wisconsin
WHAT YOU LEARN
Leaders at two established Portfolio Program Sponsor organizations will share their successes in and key elements of getting senior leadership’s visible and tangible support for their programs.

Breakout Session 4
Portfolio Program Data and Information
9:00 AM – 10:15 AM

What Kind of Information Do We Need From Each Other?
Prado 2
PANEL:
Morris J. Blachman, PhD, FACEHP, University of South Carolina School of Medicine – Palmetto Health
Linda Caples, MBA, Medical College of Wisconsin
Wallace E. Jones, Jr., MLD, American Board of Ophthalmology
WHAT YOU LEARN
Portfolio Sponsor organizations and Member Boards have identified the need for mutual sharing of information. This session will identify what type of information is valuable to organizations and to ABMS Member Boards. The conversation will set the stage for future Portfolio Program and MOC evaluation and assist with identifying metrics to help evolve MOC.

Data – Mining and Sharing Across Organizations
Prado 1
FACILITATOR:
Lisa Hebert, RD, MHS, PA-C, Carolinas HealthCare System
WHAT YOU LEARN
How are Portfolio Sponsor organizations using internal data to identify performance gaps and evaluate the impact of portfolio activities? How can information be shared for cross-organization QI efforts including aggregate analysis, trending, and reporting formats?

Portfolio Evaluation and Impact (ROI) for an Organization
Guggenheim 1 and 2
FACILITATOR:
Grant Greenberg, MD, MHSA, MA, University of Michigan Health System
WHAT YOU LEARN
How are organizations using quantitative and qualitative internal data to determine the overall impact and ‘value’ of the Portfolio Program in their institutions? In addition to documenting program value, the information provides decision support by identifying strengths, weaknesses, and opportunities for improvement.

Choosing Measures for Pediatric Quality Improvement
Field Room
FACILITATOR:
Virginia A. Moyer, MD, MPH, American Board of Pediatrics
PRESENTERS:
Ramesh Sachdeva, MD, JD, PhD, DBA, FAAP, American Academy of Pediatrics
Lloyd N. Werk, MD, MPH, Nemours Children’s Health System
WHAT YOU LEARN
Only a small number of nationally vetted measures are available for pediatric quality improvement purposes. This session will address recent efforts to develop additional measures for use in pediatrics.

Breakout Session 5
Portfolio Program Data and Information
10:30 AM – 11:45 AM

What Kind of Information Do We Need From Each Other?
Prado 2
PANEL:
Morris J. Blachman, PhD, FACEHP, University of South Carolina School of Medicine – Palmetto Health
Linda Caples, MBA, Medical College of Wisconsin
Wallace E. Jones, Jr., MLD, American Board of Ophthalmology
WHAT YOU LEARN
Portfolio Sponsor organizations and Member Boards have identified the need for mutual sharing of information. This session will identify what type of information is valuable to organizations and to ABMS Member Boards. The conversation will set the stage for future Portfolio Program and MOC evaluation and assist with identifying metrics to help evolve MOC.
Data – Mining and Sharing Across Organizations
Guggenheim 1 and 2
FACILITATOR:
Lisa Hebert, RD, MHS, PA-C, Carolinas HealthCare System
WHAT YOU LEARN
How are Portfolio Sponsor organizations using internal data to identify performance gaps and evaluate the impact of portfolio activities? How can information be shared for cross-organization QI efforts including aggregate analysis, trending, and reporting formats?

Portfolio Evaluation and Impact (ROI) for an Organization
Field Room
FACILITATOR:
Grant Greenberg, MD, MHSA, MA, University of Michigan Health System
WHAT YOU LEARN
How are organizations using quantitative and qualitative internal data to determine the overall impact and ‘value’ of the Portfolio Program in their institutions? In addition to documenting program value, the information provides decision support by identifying strengths, weaknesses, and opportunities for improvement.

Forum Debrief
12:00 PM – 12:30 PM
Guggenheim 1 and 2
FACILITATOR:
Lois Margaret Nora, MD, JD, MBA, American Board of Medical Specialties
WHAT YOU LEARN
Discuss key learnings that attendees plan to implement in their organizations and suggest areas for future QI Forums, sponsor/board calls, and collaborations.

Adjournment (except Pediatrics)
12:30 PM
Boxed lunches are available for departing attendees.

Pediatrics Portfolio Program Lunch and American Board of Pediatrics Update
12:30 PM – 1:15 PM
Guggenheim 3
SPEAKER:
Virginia A. Moyer, MD, MPH, Vice President for Maintenance of Certification and Quality, American Board of Pediatrics; Board of Directors Chair, ABMS Multi-Specialty Portfolio Approval Program

Pediatrics Portfolio Program Sponsor Stories
1:15 pm – 2:15 pm
Guggenheim 1 and 2
PRESENTERS:
Susanna A. McColley, MD, Ann & Robert H. Lurie Children’s Hospital of Chicago, Stanley Manne Children’s Research Institute
Jennifer Russell, MHSA, Cincinnati Children’s Hospital Medical Center
April M. Taylor, MS, MHA, CPHQ, CPPS, The Children’s Hospital of Philadelphia
WHAT YOU LEARN
This session will focus on the success stories from Pediatric Portfolio Sponsors including the barriers they encountered along the way.
Barbara Ackerman, RN, MPH, CPHQ
Ms. Ackerman is the Director of Program Development at Cleveland Clinic’s Quality and Patient Safety Institute, as well as a Certified Professional in Healthcare Quality with 20 years of healthcare quality measurement and improvement experience. She led Cleveland Clinic’s Multi-Specialty Portfolio Approval Program (Portfolio Program) sponsor application process and was instrumental in launching the program at her organization. Ms. Ackerman now serves as the Administrator of Cleveland Clinic’s Portfolio Program in collaboration with a medical director. In addition, she oversees the clinic’s annual outcomes books (a series of clinical, institute-specific publications designed for the peer physician national audience), manages Internet quality performance reports for Cleveland Clinic hospitals, and spearheads quality and patient safety education initiatives.

Robert J. Birnbaum, MD, PhD
Dr. Birnbaum is Vice President for Continuing Professional Development and Implementation Science at Partners Healthcare and Assistant Professor of Psychiatry at Harvard Medical School. A practicing psychopharmacologist, he conducted his PhD research in molecular neurogenetics. The founding Executive Director of the Massachusetts General Hospital Academy, Dr. Birnbaum has devoted much of his career to managing large-scale education/training efforts, studying education methodology and impact. He serves as the primary liaison to the American Board of Medical Specialties (ABMS) for Partners Healthcare, a Portfolio Program Sponsor. The Partners Healthcare Office for Continuing Professional Development is an Accreditation Council for Continuing Medical Education (ACCME) accredited provider, with commendation, and has piloted more than 60 integrated Maintenance of Certification/Continuing Professional Development (MOC/CPD) programs across its integrated health care delivery network. Dr. Birnbaum serves on the Partners’ Educational Review Board and the Foundation Board of the Alliance for Continuing Education in the Health Professions. He is a Member-at-Large of the Education Research Committee of the Society for Academic Continuing Medical Education (SACME) and has served on Harvard Medical School’s Standing Committee on Continuing Medical Education. Dr. Birnbaum is Board Certified by the American Board of Psychiatry and Neurology (ABPN).

Morris J. Blachman, PhD, FACEHP
Dr. Blachman is Associate Dean for Continuous Professional Development and Strategic Affairs and Clinical Professor in the Department of Neuropsychiatry and Behavioral Science at the University of South Carolina School of Medicine. He has led the school’s Palmetto Health Continuing Medical Education Organization since 1996, and serves as Co-Chair of its MOC Steering Committee. He is highly engaged in the field of continuing education for health professionals, having held leadership positions in the Association of American Medical Colleges, SACME and the Alliance for Continuing Education in the Health Professions. Dr. Blachman is a reviewer for the Journal of Continuing Education in the Health Professions and reviews abstracts for research awards and for presentations. Additionally, he serves on major medical school and hospital committees related to Quality Improvement (QI) and patient care. Dr. Blachman has a PhD in Political Science from New York University and served as Acting Coordinator for Executive Development of the Foreign Service Institute in the U.S. Department of State.
Christine Taddy Bloom, MPH  
As Program Director for Continuing Medical Education (CME) at the Park Nicollet Institute in St. Louis Park, Minnesota. Ms. Bloom oversees Quality in CME and the Portfolio Program. With experience in a wide variety of health care settings, including corporate, government, and integrated care delivery systems, she has focused on health education, corporate wellness, grant management, Institutional Review Board administration, and, most currently, professional education and clinical quality. Ms. Bloom received her Master's in Health Services Policy and Management and her Bachelor of Arts in Psychology and Public Health from the University of Minnesota. She is a member of the American Public Health Association and the Alliance for Continuing Education in the Health Professions.

Linda Caples, MBA  
Mrs. Caples is the Director of Continuing and Professional Education at the Medical College of Wisconsin. She oversees the administration of the Portfolio Program and CME program, as well as the development of the interprofessional education program. Prior to joining the Medical College, Mrs. Caples served as the Director of Education for the International Parkinson's and Movement Disorder Society. She travels throughout the United States and Europe, working with physicians to provide high quality education to clinicians and researchers. Her past work also expanded to Asia, South America, and Sub-Sahara Africa. She is a member of the Wisconsin Medical Society's Council on Medical Education, Co-Chair of the Wisconsin Consortium for Continuing Medical Education, and Chair-Elect of the Membership Committee for SACME.

Grant Greenberg, MD, MHSA, MA  
Dr. Greenberg serves as the Associate Medical Director for Quality at the University of Michigan Medical Group and Associate Chair for Information Management and Quality for the Department of Family Medicine at the University of Michigan Health System (UMHS) in Ann Arbor. At UMHS, he also serves as Manager of the ABMS Portfolio Program, and contributes as a reviewer for the program. Dr. Greenberg received his undergraduate and medical degrees from the University of Michigan, where he also completed a residency in Family Medicine. He holds Master's degrees in Ecology and Evolutionary Biology from Indiana University and in Health Services Administration from the University of Michigan School of Public Health (UMSPH). Dr. Greenberg is Board Certified by the American Board of Family Medicine (ABFM).

R. Van Harrison, PhD  
Dr. Harrison is a Professor in the Department of Learning Health Sciences at the University of Michigan Medical School. His training as a social psychologist emphasized individual behavior in organizational settings. A major interest of his is the evaluation and improvement of physician performance in the delivery of health care, including developing clinical guidelines and measures of clinical performance, and designing changes at the individual and organizational levels to improve care. Dr. Harrison has studied the delivery of CME at medical schools and how better to align CME and QI. His educational activities include teaching systems and QI to physicians, residents, and medical students. At UMHS, he is a member of the Operations Committee of the system-wide Michigan Quality System, a co-lead for clinical guidelines development and the Part IV MOC Program within the Medical Group's Quality Management Program, and Assistant Director of Continuous Professional Development.
Lisa Hebert, RD, MHS, PA-C
As Vice President of Quality Improvement and Care Redesign within the Carolinas HealthCare System Medical Group, Ms. Hebert has led the development of the Ambulatory Quality Division that now supports QI and patient safety activities. She also provides clinical oversight and coordination of the development of new care delivery models and integration of new clinical products and services. Ms. Hebert completed her internship at Strong Memorial Hospital in Rochester, New York. She graduated from the Duke University School of Medicine Physician Assistant Program with a Master of Health Science degree. She has worked mainly in primary care for the majority of her 20-year career, with a decade of direct patient care experience as an Advanced Clinical Practitioner.

Karen E. Heiser, PhD
Dr. Heiser is Vice President of Education and Designated Institutional Officer at Nationwide Children’s Hospital (NCH). She is responsible for CME, serving more than 15,000 physicians and 14,000 allied health professionals annually. Dr. Heiser also is responsible for 58 residency and fellowship programs in graduate medical education (GME). NCH is a Portfolio Program Sponsor, and Dr. Heiser oversees 57 active projects. She also oversees educational affiliations with more than 400 organizations; serves as Co-Director of the Quality Improvement Essentials Course; and is responsible for outreach education at eight affiliated hospitals in a 44-county region. Dr. Heiser serves on numerous hospital committees, including QI and Office of the Chief Medical Officer. She also served as the American Hospital Association representative on the ACCME Accreditation Review Committee, and she has been an ACCME and Joint Accreditation surveyor since 2000. In 2014, ACCME produced a video, “How Nationwide Children’s Hospital Created a Culture of Safety,” illustrating how CME, QI, and MOC can collaborate to change the quality culture in an organization.

Debra Jensen
Ms. Jensen joined Seattle Children’s Hospital as Program Coordinator II Maintenance of Certification in 2014. She is responsible for program administration, management and communication, and she recently developed the program’s new online system. Ms. Jensen has more than 35 years of experience in project management. Before joining Seattle Children’s, she was an independent nonprofit consultant, grantwriter, and writer for 18 years. Prior to that, she served as Assistant Director-Corporate Relations for Principal Financial Group. She is a member of the MOCAM User Group and MOCAM Forums Working Group.

Wallace E. Jones, Jr., MLD
As Manager of MOC for the American Board of Ophthalmology (ABO), Mr. Jones has been involved in the development of practice improvement modules, self-directed QI, ABMS Portfolio Program processes, and patient safety. He has 20 years of experience in information technology (IT) and leadership development experience. Mr. Jones’ expertise has been exhibited for companies such as AstraZeneca, W.L. Gore, and GlaxoSmithKline, where he delivered training and development as well as IT solutions. He has in-depth knowledge of employee engagement, process improvement, diversity leadership, and succession planning, having successfully trained more than 600 executives. Mr. Jones has an undergraduate degree in IT and received a Master in Leadership Development degree from the Penn State School of Graduate and Professional Studies. In 2014, he completed the Intermountain Healthcare Advanced Training Program focused on QI in Healthcare.
Richard E. McClead, Jr., MD, MHA
Dr. McClead is Professor Emeritus in the Division of Neonatology, Department of Pediatrics at the Ohio State University College of Medicine and Medical Director for Quality Improvement Services at NCH in Columbus, Ohio. He completed a year of study in Advanced Improvement Methods at Cincinnati Children’s Hospital. Dr. McClead is the Associate Chief Medical Officer at NCH and is the Portfolio Manager for NCH’s Portfolio Program Sponsorship. He is actively engaged in the organization’s safety and high reliability transformational journey entitled Zero Hero, with the aim to eliminate preventable harm. Dr. McClead is leading major quality initiatives concerning decreasing neonatal length of stay and adverse drug events as well as utilization of inhaled nitric oxide and care coordination. He is a faculty member for the Quality Improvement Essentials Course offered at NCH for clinicians and middle managers. Dr. McClead is the author of numerous papers and research presentations. Dr. McClead is Board Certified by the American Board of Pediatrics (ABP).

Susanna A. McColley, MD
Dr. McColley is Director of Clinical and Translational Research at the Stanley Manne Children’s Research Institute and Associate Director of the Cystic Fibrosis Center at Ann & Robert H. Lurie Children’s Hospital of Chicago. She is a Professor of Pediatrics at Northwestern University Feinberg School of Medicine and Associate Clinical Director for Child Health at the Northwestern University Clinical and Translational Sciences Institute. As leader of the Department of Pediatrics’ QI Team, she oversees the activities of Lurie Children’s Portfolio Program for ABP. Her interest in QI began when she participated in the Cystic Fibrosis Foundation’s QI strategic plan. Dr. McColley served on the Pediatric Pulmonology sub-board and the ABP’s subspecialties committee and is currently a member of the MOC Committee. She is a Fellow of the American Academy of Pediatrics (AAP) and the American College of Chest Physicians, and has held numerous leadership roles in the American Thoracic Society. Topics of her more than 75 publications include health disparities research and QI project outcomes. Dr. McColley is Board Certified in Pediatric Pulmonology by the American Board of Pediatrics (ABP).

Virginia A. Moyer, MD, MPH
As Vice President of MOC and Quality for ABP, Dr. Moyer oversees the continued development and implementation of the Board’s MOC Program. She provides expertise in evidence-based medicine, education, health care quality, and patient safety. Dr. Moyer joined the ABP staff in April 2013 after serving at Baylor College of Medicine and Texas Children’s Hospital as both Professor of Pediatrics and Chief of Academic General Pediatrics. Dr. Moyer is Board Certified in General Pediatrics by the American Board of Pediatrics (ABP).

Bruce A. Nitsche, MD
Dr. Nitsche is Medical Director of CME at Virginia Mason Medical Center, a nonprofit health care organization in Seattle, Wash. An Internal Medicine specialist since 1983, he has maintained a busy primary care practice for 30 years, giving him a unique perspective as both a provider and recipient of CME. At Virginia Mason, Dr. Nitsche sits on the Quality Assurance Committee and directs its Portfolio Program. He also is an active member of the Washington State Medical Association’s CME Committee. Dr. Nitsche continues to teach both in the CME and GME realm, and was voted a “Top Teacher” in the residency program for 2013. He has been a member of the Alpha Omega Alpha Honor Society since 1980. Dr. Nitsche is Board Certified by the American Board of Internal Medicine (ABIM).
Lois Margaret Nora, MD, JD, MBA
Dr. Nora is President and Chief Executive Officer of ABMS, a not-for-profit organization that supports its 24 medical specialty Member Boards in developing and implementing educational and professional standards to certify physician specialists and encourage lifelong learning and assessment. Through these efforts, ABMS helps ensure high quality health care for patients, families, and communities. Prior to joining ABMS in 2012, Dr. Nora served as Interim President and Dean of The Commonwealth Medical College in Scranton, Penn., and President and Dean of Medicine at Northeast Ohio Medical University. Her scholarly work focuses on issues in medical education, particularly the student environment, and issues at the intersection of law and medicine. Dr. Nora’s honors include the American Medical Women’s Association President’s Recognition Award, the Association of American Medical Colleges’ Group on Educational Affairs Merrel Flair Award in Medical Education, and the Phillips Medal of Public Service from the Ohio University College of Osteopathic Medicine, among others. Dr. Nora is Board Certified in Neurology by the American Board of Psychiatry and Neurology (ABPN).

Jan E. Patterson, MD, MS
Dr. Patterson is Associate Dean for Quality and Lifelong Learning, Director of the Center for Patient Safety and Health Policy, and Professor of Medicine/Infectious Diseases and Pathology at the University of Texas (UT) Health Science Center at San Antonio. With more than 20 years of experience in health care epidemiology, she is the UT System Executive Vice Chancellor’s Health Fellow in Clinical Effectiveness Programs. Dr. Patterson also directs the Clinical Safety and Effectiveness Course in San Antonio, a project-based QI/patient safety curriculum for faculty and staff. She serves on the Board of Directors for the Commission for Certification of Healthcare Continuing Professional Development Professionals, and is certified in Medical Quality. Dr. Patterson serves on the ABIM’s Diseases Committee. She is a Past President of the Society for Healthcare Epidemiology of America and former member of the Board of Directors for the Infectious Diseases Society of America. Dr. Patterson is a graduate of UT Medical School at Houston and recently completed a Master’s in Health Care Management at the Harvard School of Public Health. Dr. Patterson is Board Certified by the American Board of Internal Medicine (ABIM).

Peggy Paulson, MS
Ms. Paulson is an Operations Manager at Mayo School of Continuous Professional Development (MSCPD) at the Mayo Clinic. In this role, she specializes in MOC, QI, and accreditation and has administrative oversight for the Quality Review Board. The MSCPD Quality Review Board MOC Portfolio Program started in 2009 as a pilot and in 2014 approved 111 quality projects for MOC Part IV credit. Ms. Paulson’s experience includes oversight of all CME activities (annually 90+ live activities). She participates in the Midwest CME Network consortium, has presented regionally and nationally in quality and accreditation, and is a current member of the 2015 ABMS Quality Forum Planning Committee. Her experience in accreditation of all types includes work with the Joint Commission and Liaison Committee on Medical Education. Ms. Paulson is an integral leader in adding accreditations to MSCPD and is currently leading a group to review the triple accreditation option for Mayo Clinic (ACCME, Accreditation Council for Pharmacy Education, and American Nurse Credentialing Center).
David W. Price, MD, FAAFP, FACEHP
Dr. Price is Senior Vice President of the ABMS Research and Education Foundation and Director of the ABMS Multi-Specialty Portfolio Approval Program. He is also Professor of Family Medicine at the University of Colorado School of Medicine, and currently chairs the Association of American Medical Colleges’ Group on Educational Affairs section on Continuing Education and Improvement. From 1988-2015, he was a member of the Colorado Permanente Medical Group (Kaiser Permanente Colorado), where he served multiple roles, including Department Chair of Family Medicine, Director of Medical Education (1997 – 2015), and physician investigator with the Kaiser Permanente Colorado Institute of Health Research. He is a past Director of the Accreditation Council for Continuing Medical Education. Dr. Price is also a Past-President of the Colorado Academy of Family Physicians and past-delegate and committee member in the American Academy of Family Physicians. He served on the American Board of Family Medicine (ABFM) Board of Directors from 2003-2008, where he chaired the R & D and Examination (Maintenance of Certification) committees, and was ABFM Board Chair from 2007 -2008. Dr. Price is Board Certified by the American Board of Family Medicine (ABFM).

Carla M. Pugh, MD, PhD
Dr. Pugh is the Susan Behrens Professor of Education and Patient Safety at the University of Wisconsin. Her clinical specialty is Acute Care Surgery. Prior to joining the University of Wisconsin, she was an Associate Professor of Surgery and Associate Professor of Education at Northwestern University in Chicago. During her surgery residency at Howard University, Dr. Pugh recognized the need for new and innovative modes for assessing hands-on clinical skills. While obtaining a PhD in Education at Stanford University, she was awarded a method patent on the use of haptic sensors and data acquisition technology to measure and characterize the sense of touch. Dr. Pugh is nationally recognized for her research on the use of simulation technology to assess and quantitatively define hands-on clinical skills. More than 100 medical and nursing schools use one of her sensor-enabled training tools for their trainees. In 2011, Dr. Pugh received the Presidential Early Career Award for Scientists and Engineers from President Obama. She delivered a presentation at TEDMED2014 in San Francisco. Dr. Pugh is Board Certified by the American Board of Surgery (ABS).

Jennifer Russell, MHSA
Ms. Russell joined the James M. Anderson Center for Health Systems Excellence at Cincinnati Children’s Hospital Medical Center (CCHMC) as a QI Consultant in 2005. She is a certified Six Sigma Black Belt and holds a Master’s degree in Healthcare Administration from the UMSPH, where she is active in the alumni/student mentoring program. In her current role at CCHMC, Ms. Russell collaborates with medical staff and departmental physician leadership to support key provider-level measurement, analysis, and improvement initiatives, emphasizing their alignment with hospital and specialty QI priorities. She partnered with ABP to develop and refine processes within its Portfolio Program; CCHMC was the first children’s hospital designated as an ABP Portfolio Program Sponsor and will transition to the ABMS Portfolio Program in 2015. A nationally recognized expert on the integration of MOC activities with existing QI programs, Ms. Russell frequently provides consultation on the topic to hospitals and specialty societies.
Ramesh Sachdeva, MD, JD, PhD, DBA, FAAP
Dr. Sachdeva serves as Associate Executive Director of the American Academy of Pediatrics (AAP). He also serves as the AAP’s Director of the Department of Subspecialty Pediatrics and Medical Director of Quality Initiatives. He is a practicing physician in pediatric critical care and sleep medicine at the Children’s Hospital of Wisconsin, and a Professor of Pediatrics at the Medical College of Wisconsin. He holds two doctorates – a PhD in Epidemiology, focusing on outcomes research, from the University of Texas, School of Public Health, and a doctorate in Business Administration in Management Sciences, focusing on organizational change, Glasgow, UK. He holds a JD and has previously served as an Adjunct Professor of Law at Marquette University Law School. Dr. Sachdeva is Board Certified by the American Board of Pediatrics (ABP).

Lindsey A. Safford, BBA
Ms. Safford is a CME/MOC Specialist in the Division of Education at Marshfield Clinic Health Systems, Inc., in Wisconsin. She is responsible for working with the clinic’s Quality Project Review Board for its Institutional MOC Program. Additionally, she facilitates physician engagement to meet MOC requirements and internal system initiatives to improve patient outcomes. In her role at Marshfield Clinic, Ms. Safford also works with the Accreditation Council for Pharmacy Education, Academy of General Dentistry, ACCME, and ABMS Portfolio Program. She is the co-author of “Assessing the Impact of Medical Librarians on Identification of Valid and Actionable Practice Gaps for a Continuing Medical Education Committee” published in the Journal of Continuing Education in the Health Professions in 2014. Previously, she worked as a Residency and Fellowship Coordinator in the Division of Education at Marshfield. She received her Bachelor’s degree in Business Administration from the University of Wisconsin-Whitewater.

April M. Taylor, MS, MHA, CPHQ, CPPS
Ms. Taylor is the Director of Quality and Patient Safety CHCA at the Children’s Hospital of Philadelphia. In her role, she leads efforts to continuously improve the safety, effectiveness, efficiency, patient-centeredness, equity, and timeliness of health care service to all patients. Ms. Taylor plays a key role in the development of physician quality indicators, management of the hospital’s Portfolio Program, and design of QI education for clinicians and trainees. Her previous experience includes positions at Catholic Health East, a 40-hospital and continuing care system; Our Lady of Lourdes Health System; and Pittsburgh Mercy Health System, where she facilitated multi-hospital QI collaboratives. Ms. Taylor currently serves on the Healthcare Quality Certification Commission’s Job Analysis and Test Development committees and is an examiner for the Keystone Alliance for Performance Excellence – the Pennsylvania Baldrige program.

Lloyd N. Werk, MD, MPH
Dr. Werk is Chief of the Division of General Pediatrics at Nemours Children’s Hospital in Orlando. He has an interest in QI interventions, specifically how IT can enhance health care delivery and prevent childhood obesity. His responsibilities in Nemours’ Office of Quality and Safety revolve around developing systems and measures to help clinicians reach institutional goals in quality and health outcomes. In addition, Dr. Werk is co-director of an integrated multidisciplinary weight management program focusing on medical, nutritional, and psychosocial assessment as well as management of obesity and its related multiple comorbidities. He has academic appointments at the University of Central Florida, Florida State University, and University of South Florida. Dr. Werk completed his undergraduate degree at Johns Hopkins University, earned a Doctor of Medicine degree from Tel Aviv University, and a Master’s degree with a concentration in Epidemiology and Biostatistics from Boston University School of Public Health. He completed a pediatric residency at Children’s Hospital of Buffalo, and practiced primary care pediatrics for several years on Long Island, New York, prior to completing a general Academic Pediatrics Fellowship at Boston University. Dr. Werk is Board Certified by the American Board of Pediatrics (ABP).
In 2014 the ABMS Research and Education Foundation launched the Visiting Scholars Program and selected five charter scholars. The one-year, part-time program is designed to support early career physicians and scientists in their pursuit of research that can improve patient care and further medical education. As our 2014-2015 scholars have progressed through this inaugural year, their research has matured. Please join us for their presentations (listed below) and meet them during the poster session. As the Senior Scholar in Residence, I am impressed by the potential of these research efforts to make a lasting impact on patients and physicians.

Sincerely,

Sheldon Horowitz, MD
Senior Scholar in Residence
ABMS Research and Educational Foundation

ABMS is accepting applications for the 2015 – 2016 Visiting Scholars Program until May 29, 2015. Please contact Marty Daiga, Program Coordinator, ABMS Research and Education Foundation at ABMSVisitingScholars@abms.org.
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