



Five-Year Strategic Plan, 2023-2028 Thurston Arthritis Research Center and The Division of Rheumatology, Allergy and Immunology

Executive Summary

Purpose: To develop a roadmap for TARC and the Division (RAI) to follow to achieve our group's combined vision and long-term goals.

Process: In December of 2021, the work began to review, revise, and update the prior strategic plan created in 2014 and updated in 2018-19. Significant progress was noted on all six prior strategic goals in research, clinical trials, education, clinical care, and marketing. The 2023-2028 strategic plan was led by a steering committee consisting of the TARC and RAI leadership team and was carried out by six working groups with team leaders and members from TARC and RAI. The charge set to the working groups was to dream big and develop an overarching strategic goal with objectives and actionable items for their group. The working groups were also asked to include a DEI "coil" throughout the sections of the plan.

In June 2022, a retreat was conducted to begin identifying and shaping the collected data from the working groups. Meeting attendees included the steering committee and all working group team leaders and members. Each working group presented their initial plan followed by breakout sessions for group discussion where each group consisted of a mix of members from the various teams. Following the retreat, the working groups refined their objectives and action items based on feedback obtained during the retreat and then the steering committee worked to integrate the material into a comprehensive plan. Overlapping objectives were noted in the plans developed by the two research working groups. For this reason, and to better integrate the spectrum of basic, translational and clinical research, the objectives and action items from the two research working groups were combined.

Steering Committee

- Richard Loeser, MD, Director, Thurston Arthritis Research Center
- Beth Jonas, MD, Chief, Division of Rheumatology, Allergy & Immunology)
- Leigh Callahan, PhD, Associate Director, Thurston Arthritis Research Center
- Scott Commins, MD, PhD, Associate Chief, Division of Rheumatology, Allergy and Immunology

Working Groups

- **Clinical and epidemiological research**

Team leader: Kelli Allen, PhD

Team members: Astia Allenzara, Carolina Alvarez, Liubov Arbeeva, John Batsis, Leigh Callahan, Abby Gilbert, Yvonne Golightly, Kim Grimm, Katie Huffman, Rumey Ishizawar, Millie Kwan, Amanda Nelson, Todd Schwartz, Saira Sheikh, Sandra Soto, Louise Thoma, Tessa Walker, Chase Wooley

- **Basic and translational research**

Team Leaders: Onyi Iweala, MD, PhD, Doug Phanstiel, PhD

Team Members: Richard Loeser, Brian Diekman, Lara Longobardi, Scott Commins, Jenny Ting, Erin Steinbach, Matthew Fisher

- **Clinical care**

Team Leaders: Nicole Orzechowski, MD, Millie Kwan MD, PhD

Team Members: Amanda Snyder, Abby Gilbert, Scott Commins, Tiffany Chalmers, Thuy Phan, Gretchen Romano, Astia Allenzara

- **Clinical trials**

Team Leader: Saira Sheikh, MD

Team Members: Hannah Mitchell, Abby Gilbert, Alfredo Rivadeneira, Amanda Lusa, Anthony Trujillo, Becki Cleveland, Emily McCormick, Shruti Saxena Beem, Tessa Englund, Ellie Yakubu, Roger Huamani, Rosa Aguilar, Scott Commins, Onyinye Iweala, Vimal Derebail

- **Education and professional development**

Team Leaders: Rumei Ishizawar, MD, PhD, Sofija Volertas, MD

Team Members: Amanda Nelson, Amanda Snyder, Michael Cunningham, Jessica MacDougall, Samantha Kemper

- **Marketing and communications**

Team Leaders: Bradd Pavur, Nick Beresic

Team Members: Alfredo Rivadeneira, Yvonne Golightly

2023-2028 TARC and RAI Strategic Plan

Basic and Clinical Research

Strategic Goal: Advance, Expand and Further Integrate our Basic, Translational and Clinical Research

Objective 1: Expand TARC research through recruiting additional investigators including those working in new content areas

- 1.1 Action:** Recruitment
- Recruit a clinical investigator with expertise in an area that complements current TARC research; potential priority areas include genetic epidemiology and phenotyping/precision medicine
 - Recruit additional physician scientist(s) in Rheumatology with research expertise in immunology (innate immunity or adaptive immunity)
 - Co-recruit a PhD immunologist (with Microbiology and Immunology or Genetics) to complement research in immunology, autoimmunity, and/or the immunology of allergy.
- 1.2 Action:** Interdepartmental collaboration to expand research in several key areas:
- Expand TARC research in Health Outcomes, Health Disparities, and Quality Improvement
 - Increase interaction with departments and centers on campus that have research expertise in areas that would complement TARC research.

Objective 2: Improve TARC infrastructure for scientific collaboration

- 2.1 Action:** Create a position for a TARC “senior or lead project coordinator” to help to centralize processes, support early career investigators & maximize TARC research support.
- 2.2 Action:** Develop and maintain a centralized data base of human samples and clinical data held by TARC investigators and promote its use in collaborative studies.
- 2.3 Action:** Develop a TARC Scientific External Advisory Board.
- 2.4 Action:** Continue applications for shared equipment through the SOM that could be utilized by multiple TARC investigators.
- 2.5 Action:** Hold mini retreats with invited speakers from other departments/centers to promote new collaborations.

Objective 3: Build Community & efficiency among TARC research personnel

- 3.1 Action:** Develop structures & opportunities for research staff to share experiences & resources

3.2 Action: Provide opportunities for relationship-building and social interaction among research personnel (e.g., happy hours, lunches, etc.)

3.3 Action: Explore potential for a more centralized group of research staff who could contribute to different projects depending on time & funds

Objective 4: Enhance diversity of TARC faculty and staff

4.1 Action: Make diversity a priority for recruitment including trainees who may be future faculty

4.2 Action: Increase interaction with diversity programs on campus including PREP, SPIRE, WinSPIRE, Carolina Postdoctoral Fellows for Faculty Diversity, etc. and make sure our research program is known as an outstanding place for these trainees.

4.3 Action: Increase interaction with local universities (particularly those that serve URM) including identifying and inviting potential TARC research seminar speakers.

Clinical Care

Strategic Goal: To continuously innovate to provide excellent care to the patients in the Rheumatology and Allergy Clinics

Objective 1: To provide the highest quality of care for the patients we serve

1.1 Action: Create a welcome packet for new patients: what we see and do, policies, scheduling, myChart, communication, expectations, phone numbers for the clinic, and other important information.

1.2 Action: Advocate for in-person interpreters in Eastowne

1.3 Action: Build longer visits for patients who require interpreter services

Objective 2: Develop a standard curriculum that fosters a shared understanding of common topics (diagnosis, treatment, medication management, etc.) amongst all Care Partners.

2.1 Action: Establish a series of discussions and mini-lectures to cover essential and foundational topics for all Care Partners.

2.2 Action: Compile these lectures over time to develop a shared knowledge base, hosted by the clinic, which our Care Partners can continue to reference in the future.

Objective 3: To provide the support required for each team member to work at the top of their license and strengthen our teams

3.1 Action: Create orientation packets for all new providers and staff

3.2 Action: Increase the number of scribes in clinic or pilot test AI scribe service

3.3 Action: Schedule regular (2-4 times per year) all clinical staff meetings (schedulers, clinic staff, fellows, PAs, NPs, and physicians)

Objective 4: To apply diversity, equity and inclusion principles to all aspects of patient care, work needs and education

4.1 Action: Include all clinical staff in TARC DEI newsletter and option to participate in DEI initiatives.

4.2 Action: Support patients in their endeavor to find care that is respectful of their diverse backgrounds. Provide care that is unbiased and is equitable and inclusive of all patients who seek care in our clinics.

4.3 Action: Support clinical staff in an environment that is free from abuse and harassment be that from patients or other team members. Provide a pathway for team member support in cases of threatening action or language.

Clinical Trials

Strategic Goal: Ensure equitable opportunities for patients to access cutting edge therapeutics and innovative programs to enhance their health and well-being, and to integrate clinical trials into the day-to-day care of our patients.

Objective 1: Expand current infrastructure and human power with additional investigators and research personnel to support clinical trials

1.1 Action: Recruit and train investigators with expertise in diverse content areas who are interested in clinical trials and provide dedicated time and support

1.2 Action: Develop an apprenticeship model and interest group for providers and fellows to support career development in clinical trials

- Integration of clinical trials into the fellowship experience

1.3 Action: Allocate designated funds to hire research coordinators and study personnel, including a PA/nurse practitioner to support multiple studies and investigators

Objective 2: Create a practical framework for the integration of clinical trials into day-to-day patient care and increase visibility and branding for clinical trial opportunities

2.1 Action: Dedicate research personnel and utilize technology/create a database for screening and recruitment of patients from the clinic e.g., assessing patient interest and eligibility during check-ins for appointments in the clinic

- Dedicated study coordinator in clinic to engage with patients and providers
- Create partnership with nursing staff in clinic to incorporate clinical trial discussions into the clinic workflow

- 2.2 Action:** Encourage multidisciplinary, collaborative clinical trial endeavors
- 2.3 Action:** Hold meetings with Patient Stakeholder Advisory Boards on an annual basis as a source of input on patient recruitment strategies
- 2.4 Action:** Utilize technology and social media to highlight clinical trial opportunities for patients
- Keep website updated with new clinical trials that are actively enrolling
 - Envision screens/monitors in the clinic that display active clinical trials
 - Utilize technology/EMR to notify patients of their eligibility for trials, and notify providers when they see patients that may be eligible for a trial

Objective 3: Expand community outreach and diversity, equity, and inclusion efforts in the context of clinical trials

- 3.1 Action:** Conduct implicit bias training with faculty and fellows, specifically in the context of clinical trials, and facilitate formal discussions on how to introduce clinical trial opportunities to our patients, particularly patients from racially and ethnically diverse and underrepresented groups
- 3.2 Action:** Expand community outreach efforts with a focus on providers and patients throughout the state of North Carolina, with a focus on minoritized populations.
- Explore collaboration with community providers/sites including the possibility of satellite sites
 - Consider mobile outreach with the community, specifically in the area of clinical trials
- 3.3 Action:** Streamline an easy and efficient process to expedite patient referrals from the community to clinical trials program
- 3.4 Action:** Hire diverse faculty and research study personnel to build a more inclusive environment
- 3.5 Action:** Expand opportunities for mobile outreach, decentralized trials, and transport facilities for patients

Objective 4: Foster a culture of wellness within our clinical trials team

- 4.1 Action:** Host biweekly/monthly working team meetings with lunch provided
- 4.2 Action:** Increase in-person social opportunities and team building with coworkers during set work hours
- 4.3 Action:** Ensure adequate support and compensation for faculty and research personnel

Objective 5: Collaboration with TARC Basic/Translational Science and Clinical Research teams to compile central resources around disease-specific biorepository and clinical registry infrastructure

5.1 Action: Regular meetings and discussions with TARC Basic/Translational Science and Clinical Research teams to compile a central resource that encourages collaboration between basic/translational and clinical research scientists

Education and Professional Development

Strategic Goal: To advance the quality and impact of our educational programs to improve outcomes for learners at all levels.

Objective 1: Improve the quality and timeliness of feedback to fellows

- 1.1 Action:** Establish the expected frequency of feedback for fellows for inpatient and outpatient rotations
- 1.2 Action:** Develop appropriate feedback forms
- 1.3 Action:** Hold a training session for faculty on giving and receiving feedback as well as how to use the MedHub portal
- 1.4 Action:** Develop a process for real-time feedback in clinical setting
- 1.5 Action:** Develop a process for real-time feedback of didactic sessions

Objective 2: Enhance scholarly research and QI activities for trainees

- 2.1 Action:** Assemble a “Research Opportunity Repository Database” as a resource to fellows with an update every 6 months.
- 2.2 Action:** Develop a QI project database and update every 6 months
- 2.3 Action:** Facilitate a series of dedicated sessions to educate fellows on a standard QI curriculum.
- 2.4 Action:** Create a box (or other physical grievance space) accessible to all members of care team, and encourage them to submit issues to troubleshoot with the goal of generating ideas for QI projects.

Objective 3: Continue development and enhancement of curriculum in Medical Education

- 3.1 Action:** Establish dates with Rheumatology and Allergy & Immunology for sessions

Objective 4: Create physical workspaces within both the clinic and hospital to serve all RAI fellows as an educational environment and encourage student-resident connection and exposure.

- 4.1 Action:** Creatively utilize our limited space and resources within the hospital to maintain a physical space for our fellows.

4.2 Action: Creatively utilize our limited space and resources at the clinic to maintain a physical space there for our fellows as well. Important to focus on fostering human connection and collaboration here.

Marketing & Communications

Strategic Goal: Develop and implement a comprehensive communications and marketing plan to increase TARC visibility, recognition, and philanthropy

Objective 1: Increase external awareness of TARC and promote its impact & resources

1.1 Action: Enhance TARC's local and national research awareness and reputation

- Expand use of social media channels such as TARC's Website, Twitter Page, Facebook Page, two TARC-generated newsletters
- Increase collaboration with organizations that can help us further spread our messages (ACR, OARSI, OAAA, other professional organizations and foundations)
- Work with the UNC Health Foundation when they present opportunities, or when periodic opportunities arise (such as TARC Heal Tuesday), in order to raise funds to meet the goals of the other working groups
- Leverage faculty 'wins' such as grants, promotions, new publications, leadership roles in associations and at publications, etc.
- Support important, recurring TARC efforts (examples listed below) with timely, coordinated communication campaigns via social media, newsletters, cross-promoted emails, and the TARC and RAI websites
 - RAI fellowship recruitment – assist the DOM Communications manager for RAI, who will be updating website materials related to fellowship recruitment.
 - Immuno-Oncology program
 - Penicillin Allergy de-labeling project

1.2 Action: UNC Core Center for Clinical Research (CCCR)

- Release summary announcements every 6 months, listing successes to date, and shared via website, social media, and partner organizations.
- Explore broader distribution of "CCCR Catch Up" newsletter, additional communications coordination with OAAA when possible, as well as speakers' organizations/communications efforts

1.3 Action: Increase patient enrollment in Johnston County Health Study (JoCoHS)

- Periodically co-announce JoCoHS news on TARC website and social media
- Establish periodic communications counsel to JoCoHS leadership to address their marketing and communications needs.
- Periodic JoCoHS social media "reminders" regarding enrollment, if desired by JoCoHS leadership

Objective 2: Showcase TARC’s long history of commitment to Diversity, Equity & Inclusion, including past and current research to benefit underserved patient populations

2.1 Action: Highlight current Center/Division initiatives related to DEI in Center’s existing newsletters, announcements, and other promotion efforts, such as

- Formation of our DEI Workgroup
- Both TARC and RAI’s websites host CCCR online content and extensive resources to support DEI
- DEI Newsletter
- DEI-related presentations from TARC, CCCR, and Fellowship Programs

2.2 Action: Draw attention to Center/Division’s shared long history of and continued focus on research and care of underserved populations, including the following past/present projects and priorities:

- Johnston County Health Study (JoCoHS) – Study’s innovative focus and recently increased participant enrollment of patients belonging to historically underrepresented populations
- Efforts to support Latino Communities such as specialized clinic geared towards Latino patients, and Camine con Gusto program support
- Current pilot program for telemedicine-based rheumatology co-consults/offerings for HCPs in rural settings

Objective 3: Strengthen our branding with clarity and consistency across TARC & RAI outgoing communications to clarify the interwoven roles of both in their shared work

3.1 Action: Decide whether to use “TARC” or “Thurston” as our standard, center- and division-wide short-form name

3.2 Action: Internal initiative to collaboratively design email signature standards across Center and Division, in terms of naming, content, formatting, typefaces, and fonts, allowing for individual customization within these unifying shared standards

Objective 4: Promote RAI Fellowship Programs to increase recognition and drive recruitment

4.1 Action: Empower fellowship leaders for Rheumatology and Allergy/Immunology to reach out to candidates via Instagram {now underway} and other relevant social media platforms

4.2 Action: Assist fellowship leaders with social media account development and promotion as well as periodic publication through TARC social media channels