



National Consensus Development and Strategic Planning for  
Health Care Quality Measurement

# Endorsement & Maintenance Scientific Methods Panel Charter

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# Scientific Methods Panel (SMP) Charter

## Consensus-Based Entity (CBE) Overview and Objectives

Battelle serves as a Centers for Medicare & Medicaid Services (CMS)-certified CBE. Through the Partnership for Quality Measurement (PQM), we convene experts and interested parties across the health care field, including patients, to 1) evaluate health care quality and efficiency/resource use measures and 2) deliver consensus-based recommendations through a transparent process. Battelle convenes the SMP to provide expert advisory support to the PQM.

More information about CBE measure review processes can be found on the PQM website: [Endorsement and Maintenance \(E&M\)](#), [Pre-Rulemaking Measure Review \(PRMR\)](#), and [Measure Set Review \(MSR\)](#).

## SMP Overview and Objectives

Within the health care measurement landscape, the SMP serves as a critical advisory group comprised of experts from various disciplines, including the following: measurement science, clinical practice, psychometrics, statistics, data science (including machine learning), artificial intelligence, health informatics, and others. The panel's objectives are pivotal to advancing health care clinical quality and cost/resource use measures:

- **Promote Scientific Rigor:** Uphold the highest standards in measure development and evaluation, focusing on scientific acceptability, including reliability and validity, as well as risk adjustment and stratification.
- **Expand Knowledge and Skills:** Drive the expansion of knowledge and skills in measurement science among stakeholders to foster innovation and advancement in the use of emerging measurement approaches and technology.
- **Standardize Evaluation Criteria:** Promote consistency in applying measure evaluation criteria; ensure measure assessments are robust, transparent, and aligned with best practices.
- **Enhance Health Outcomes:** Ultimately, contribute to the improvement of health outcomes by supporting the development and implementation of reliable and effective quality measures.

## Transparency and Accountability

In addition, a governance structure guides the SMP's input on CBE processes and deliverables, and, where appropriate, published materials credit the SMP.

- **Governance Structure:** The SMP operates under the governance and oversight of the CBE, ensuring its recommendations and actions align with the CBE's strategic goals and policies.
- **Public Engagement:** Although quarterly meetings are closed to the public to ensure SMP members' ability to provide input and share their perspectives freely, the CBE ensures transparency by publishing an agenda in advance of each meeting and a meeting summary after each meeting.

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- **Document Contributions:** Relevant CBE guidance materials will list the SMP as a contributor, acknowledging their role in shaping measure evaluation processes.
- **Appointment and Feedback:** When general PQM rosters undergo public comment, PQM identifies committee members who are also SMP nominees. This approach ensures transparency and allows interested parties to provide feedback on potential gaps in expertise.

## Roles and Responsibilities of SMP Members

Members of the SMP play a crucial role in enhancing the measure development lifecycle. To ensure methodological rigor, their primary responsibilities include providing expertise and advising on scientific methods relevant to quality measure development. Members actively contribute to developing standards and recommendations on scientific acceptability (reliability and validity), which serve as guidance for measure developers and others.

SMP members commit to a structured term of service, typically lasting 3 years. During their tenure, members are expected to participate in various meetings and activities that contribute to the panel's objectives. SMP members are also responsible for responding to requests for feedback via email, ensuring ongoing engagement and responsiveness to emerging needs.

## SMP Meetings

SMP members participate in two to four quarterly meetings, lasting approximately 2 hours each, to discuss critical issues and updates. Preparing for SMP meeting discussions includes spending 1-2 hours reviewing meeting materials.

If possible, SMP members should notify the CBE at least 2 business days in advance if they cannot attend a scheduled quarterly SMP meeting. In these cases, they may still be asked to review meeting notes and materials so they can contribute input on the meeting's topic(s).

## E&M Participation

To maintain a comprehensive understanding of processes and requirements, SMP members are required to concurrently serve on a CBE E&M Recommendation or Advisory Group for at least two complete E&M cycles. This dual participation enables SMP members to provide meaningful contributions during SMP discussions, as well as drive methodological excellence and consistency across the measure evaluation landscape, by drawing on their familiarity with CBE measure review processes.

E&M duties include becoming familiar with staff preliminary assessments and contributing to the review of measures for assigned CBE committees. PQM staff will schedule SMP quarterly meetings at dates and times that do not conflict with CBE E&M committee meetings.

This participation requirement can be lifted if 1) the SMP member has served on the CBE E&M committee within the year preceding SMP appointment, 2) the SMP member has a reasonable explanation for being unable to participate in CBE E&M activities, and 3) the SMP member receives permission from the CBE.

For more detailed information regarding E&M committee duties, refer to [Join a Committee](#).

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### Guidance Materials

SMP members also review draft guidance materials once or twice per year and identify authoritative sources to inform these standards.

### Early Term End

SMP members who are unable to perform these duties should contact the CBE and discuss options such as stepping away for a defined period or yielding their position to another candidate. SMP members who fail to attend two consecutive SMP meetings or two of their respective CBE committee meetings per year may have their term ended early.

### Eligibility Requirements for SMP Members

To be eligible for membership on the SMP, candidates must demonstrate substantial experience and expertise in relevant fields, typically supported by a strong academic and professional background. The following are key requirements for eligibility:

- **Relevant Experience:** Candidates should have demonstrated experience in fields such as:
  - Biostatistics, including Bayesian statistics
  - Epidemiology
  - Data science
  - Health services research
  - Psychometrics
  - Public health
  - Clinical research
  - Health economics
  - Health informatics
- **Educational Background:** A doctoral degree (e.g., PhD, PharmD, DNP, DrPH, ScD, MD, DO) is strongly preferred but not required.
- **Specialized Expertise:** Candidates with demonstrated expertise in one or more of the following areas are preferred:
  - Measure development and evaluation, including cost and instrument-derived measures, and risk adjustment
  - Evidence evaluation and meta-analysis
  - Quality improvement
  - Implementation science
  - Advanced technologies including machine learning, large language models (LLMs), natural language processing (NLP), and other artificial intelligence (AI) approaches
  - Fast Healthcare Interoperability Resources® (FHIR®)

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These eligibility requirements ensure the SMP includes individuals who possess the necessary skills and knowledge to contribute effectively to the development and evaluation of health quality measures.

## Nominations

CBE staff receive and review SMP nominations annually, coinciding with the CBE nominations process. With advisement from the current SMP, the CBE assesses the current composition of the panel to identify any expertise gaps that may arise due to turnover or evolving needs. In cases where gaps are identified or existing members take a temporary leave, the CBE determines the necessity of appointing temporary replacements to maintain the panel's effectiveness and diversity of expertise. This structured approach ensures the SMP remains a robust and dynamic body capable of addressing the complexities of health care clinical quality and cost/resource use measure evaluation.

SMP members may opt to step away from the SMP at the conclusion of their 3-year term or may opt to self-nominate to be considered for continued SMP participation. The SMP is comprised of 12 to 20 members.

## SMP Membership (Fall 2023-Fall 2026)

### **J. Matt Austin, PhD**

*Associate Professor, Johns Hopkins Armstrong Institute for Patient Safety and Quality, Baltimore, MD*

Dr. J. Matt Austin is a principal faculty member at the Johns Hopkins Armstrong Institute for Patient Safety and Quality. Dr. Austin has had a long-standing contract with the Leapfrog Group to provide them with strategic guidance on performance measures for their annual Hospital Survey, Hospital Safety Grade, and Ambulatory Surgery Center Survey. His research focuses on performance measurement in health care, and his current research interests include understanding the role of transparency of quality and safety data in driving improvements in care delivery, measuring disparities in the quality of care, and measuring the diagnostic performance of hospitals.

### **Daniel Deutscher, PhD, MSc.PT, BPT**

*Senior Research Scientist, Net Health Systems, USA*

*Director of PROMs, KSM Inst. for Research & Innovation, Maccabi Healthcare Services, Israel*

*Adjunct Professor, Department of Physical Therapy & Athletic Training, University of Utah, USA, Tel-Aviv, Israel*

Dr. Daniel Deutscher is a physical therapist with over 30 years of clinical experience and a clinical research scientist with over 25 years of experience in clinical, patient-reported outcome (PRO) development and implementation, and health services research related to musculoskeletal, neurologic, lymphedema, and pelvic floor conditions, with an emphasis on low back pain research. Dr. Deutscher earned his bachelor's degree in physical therapy (BPT) in 1994, his Master of Science in Physical Therapy (MSc.PT) in 2002, both at Tel-Aviv University, and his PhD (summa cum laude) at the University of Haifa, Israel, in 2011. Dr. Deutscher

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completed his post doctorate at the Institute for Clinical Outcomes Research, Salt Lake City, UT, USA, hosted by Professor Susan D. Horn.

### **Laurent Glance, MD**

*Professor and Vice-Chair for Research, University of Rochester School of Medicine and Dentistry, Rochester, NY*

Dr. Laurent Glance is a professor with tenure and vice-chair for research in the Department of Anesthesiology at the University of Rochester School of Medicine. Dr. Glance has an adjunct appointment as a senior scientist at RAND Health. He obtained his MD at Cornell and undergraduate degree at Dartmouth. Dr. Glance is a cardiac anesthesiologist, trained at New York-Presbyterian Hospital (Cornell) for residency and Memorial Sloan-Kettering for critical care medicine. His research has been funded by the Agency for Healthcare Research and Quality (AHRQ) and has focused on quality measurement and risk adjustment.

### **Paul Kurlansky, MD**

*Associate Professor of Surgery and Associate Director, Center for Innovation and Outcomes Research*

*Director of Research, Recruitment and Continuous Quality Improvement (CQI), Columbia University, College of Physicians and Surgeons/Columbia HeartSource, New York, NY*

Dr. Paul A. Kurlansky received his baccalaureate degree (cum laude) from Harvard University and received his medical degree from Tufts University Medical School. He completed his post-graduate training at New York-Presbyterian/Columbia University Medical Center in New York. Dr. Kurlansky is boarded in surgery, thoracic surgery, and with the American Board of Quality Assurance and Utilization Review. Dr. Kurlansky is the former director of research at the Florida Heart Research Institute in Miami, Florida. In 2003, he joined the Columbia HeartSource team as the director of research, recruitment, and CQI. An associate professor of surgery at Columbia, Dr. Kurlansky is the associate director for the Center for Innovation and Outcomes Research. He serves on the Quality Measurement Task Force of the Society of Thoracic Surgeons as well as on the editorial board of several peer-review journals and has published extensively on cardiac surgery and quality outcomes.

### **Zhenqiu Lin, PhD**

*Director of Data Management and Analytics, Yale New Haven Hospital, New Haven, CT*

Dr. Zhenqiu Lin is the director of data management and analytics at Yale New Haven Hospital Center for Outcomes Research and Evaluation, where he leads a team of 20 data scientists. He received his PhD in experimental psychology from Stony Brook University. He has expertise in quantitative methods and psychometrics. Dr. Lin has 20 years of experience in applying statistical methods to clinical and health service research through cross-disciplinary collaborations. He has been focusing on developing outcomes measures in the past 10 years and has led the development of many outcomes measures that have been endorsed by the National Quality Forum (NQF).

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### **Jack Needleman, PhD**

*Professor, University of California Los Angeles, Los Angeles, CA*

Dr. Jack Needleman is professor of health policy and management at UCLA School of Public Health. A health economist, he has conducted research examining the efficiency of nonprofit and for-profit hospitals and designed or evaluated hospital, physician, and nursing home payment systems. NQF, AHRQ, and Medicare have adopted measures he helped develop. Dr. Needleman has served on the steering committees for two NQF Resource Use Measures committees, the Technical Advisory Committee, and the NQF Hospital Nursing Performance Measure committee. Dr. Needleman has a PhD in public policy from Harvard University. He is an elected member of the National Academy of Medicine.

### **Sean O'Brien, PhD**

*Associate Professor of Biostatistics and Bioinformatics, Duke University Medical Center, Durham, NC*

Dr. Sean O'Brien is an associate professor in the Department of Biostatistics and Bioinformatics at Duke University Medical Center. Since 2005, he has served as statistical director of the Society of Thoracic Surgeons (STS) Data Warehouse and Analysis Center and as co-investigator of several grants and contracts using large registries to study comparative effectiveness and health care quality. Dr. O'Brien also works on the development and evaluation of quantitative methods for health care provider performance assessment. His research interests include risk-adjustment methodology, composite measures, and Bayesian modeling.

### **Jennifer Perloff, PhD**

*Scientist and Deputy Director at the Institute on Healthcare Systems, Brandeis University Waltham, MA*

Dr. Jennifer Perloff is a scientist and deputy director at the Institute on Healthcare Systems at Brandeis University. Dr. Perloff has over 15 years of experience in evaluation and health services research. Recent work includes a Center for Medicare and Medicaid Innovation (CMMI)-funded project to develop an Episode Grouper for Medicare (EGM), with special emphasis on attribution, risk adjustment, and provider profiling. Dr. Perloff also works in bundled payment, helping hospitals and insurance companies understand the risk and reliability of individual condition and treatment bundles. Finally, Dr. Perloff works on the cost, quality, and efficiency of nurse practitioner-delivered primary care.

### **Patrick Romano, MD, MPH**

*Professor, University of California Davis, Davis, CA*

Dr. Patrick Romano is professor of medicine and pediatrics at the University of California (UC) Davis and co-editor in chief of Health Services Research (HSR), an official journal of AcademyHealth. He is a graduate of Princeton University, Georgetown University School of Medicine, and UC Berkeley School of Public Health. Dr. Romano trained in internal medicine/pediatrics at University Hospitals of Cleveland and in HSR at UC San Francisco (UCSF). His research interests include developing and validating health care quality measures and using outcomes data to improve the effectiveness of health care. Dr. Romano has served on many expert committees and has led or co-led measure development efforts for numerous public agencies.

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### **Sam Simon, PhD**

*Senior Fellow, Mathematica, Cambridge, MA (formerly)*

Dr. Sam Simon, in his most recent role, was a senior fellow at Mathematica. He has over 20 years of experience conducting and leading quality measure evaluation work for federal agencies, medical specialty societies, and private payers. Dr. Simon serves as an advisor for Mathematica's portfolio of Center for Clinical Standards & Quality (CCSQ)-funded measure development and maintenance projects, which support multiple CMS quality programs. Dr. Simon recently co-led technical expert panels convened by the NQF focused on development of patient-reported outcome performance measures (PRO-PMs) and evaluation of quality measurement systems. His research interests include reliability and validity evaluation of digital quality measures, risk-adjusted outcome measures, PRO-PMs, and composite measures.

### **Alex Sox-Harris, PhD, MS**

*Professor, Department of Surgery, Stanford University, Stanford, CA*

Dr. Alex Sox-Harris is a professor in the Stanford University Department of Surgery and a senior research career scientist at the Center for Innovation to Implementation (Ci2i) at VA Palo Alto. He is a health services researcher with programs of research focused on health care quality measurement, implementation science, and treatment decisions for conditions in which surgery is a major treatment option. Dr. Sox-Harris has published more than 300 scientific papers, has had continuous federal research funding for over 20 years, and is committed to conducting research that directly informs health care policy, delivery, and outcomes.

### **Ronald Walters, MD, MBA, MHA, MS**

*Associate Vice President Medical Ops Informatics, University of Texas MD Anderson Cancer Center, Houston, TX*

Dr. Ronald Walters is an associate vice president of medical operations and informatics at the University of Texas MD Anderson Cancer Center in The Texas Medical Center, applying more than 30 years of experience and knowledge at MD Anderson. Dr. Walters is a breast medical oncologist and is responsible for the professional aspects of Clinical Operations, including Medical Informatics, the Tumor Registry, the Transfer Center, Managed Care Programs, Uncompensated Charity Care, Clinical Safety and Effectiveness, and the Physicians Network. He serves on multiple institutional committees striving for improvements in patient care, research, and their support systems. Dr. Walters pursued his MBA at the University of Houston. When he realized MBA course work did not cover enough of the health care administration aspects, he pursued and completed a master's degree as well in management of computing and information systems at Houston Baptist University. In business school he learned to appreciate that hands-on experience in the profession provides a different perspective. Dr. Walters considers himself a productive member of a great team with great leadership at MD Anderson Cancer Center.

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### **Susan White, PhD, RHIA, CHDA**

*Administrator – Analytics, The James Cancer Hospital at The Ohio State University Wexner Medical Center, Columbus, OH*

Dr. Susan White is the administrator of analytics at The James Cancer Hospital – The Ohio State University Wexner Medical Center and an associate professor in the Health Information Management & Systems Division at The Ohio State University. Dr. White is responsible for the design and implementation of alternative payment models for cancer as well as serving as the administrator for the Cancer Program Analytics Department. In her academic role, she teaches classes in statistics, data analytics, health care finance, and computer applications. Dr. White has published textbooks and articles covering outcomes assessment, risk adjustment, hospital benchmarking, and claims data mining. Dr. White received her PhD in statistics from The Ohio State University.

