

## CURRICULUM VITAE

February 2022

### David Joseph Ballard, MD, FACP, MSPH, PhD, MBA

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#### *Personal*

*Birth:* Lexington, Kentucky, 2 March 1956

*Marital Status:* Married 18 September 1986: Michela Caruso, MD  
Radiation Oncologist and Partner, Texas Oncology P.A. (TOPA)

*Children:* Elisa Justine Ballard, MBA. Born: 11 February 1988  
Product Development Director, Volio, Denver, Colorado

Alessandro David Ballard, MBA. Born: 25 March 1992  
Manager, Corporate Development & Strategy, WCG, Princeton, New Jersey

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Dallas TX 75238

*Telephone:* 469-682-0186

*Email:* [david.joseph.ballard@gmail.com](mailto:david.joseph.ballard@gmail.com)

*Language Skills:* English  
Italian (conversational/scientific fluency)  
French (basic comprehension proficiency)

*Citizenship:* United States of America and Ireland

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#### *Summary*

A member of the Board of Directors of Mentice AB, the world's leading provider of endovascular clinical simulation performance solutions, David is a citizen of the United States by birth in Lexington, Kentucky and of Ireland through his maternal grandfather's birth in Lucan, Dublin, Ireland. His professional efforts have been focused for several decades on strategic, operational and scholarly leadership in health care system transformation and advancing value-based health care. His early childhood was spent in Lexington, Kentucky as the sixth child of his parents, Margaret Mary Somers Ballard, R.N., who served in the U.S. Army Nurse Corps, 811<sup>th</sup> Air Evacuation Unit as a flight nurse in Europe in World War II before having eight children in twelve years following her marriage in 1947 to David's father, Joseph A. Ballard, M.D., F.A.A.O., a solo private practice otolaryngologist who was president of the medical staff at Saint Joseph's Hospital in Lexington. After graduation from Christ the King School, a parochial elementary school in Lexington, David attended secondary school at the Lawrenceville School in Lawrenceville, New Jersey where he was selected to All-State teams in New Jersey in baseball and football and received in 1974 the Delaware Valley Chapter of the National Football Foundation's award as its outstanding Scholar-Athlete. He also graduated with Academic Distinction from Lawrenceville and was selected as its outstanding junior and senior by the faculty and as its outstanding senior by his classmates.

He subsequently completed academic degrees with honors in chemistry, economics, epidemiology and medicine at the University of North Carolina where he was a John Motley Morehead Scholar and junior year Phi Beta Kappa inductee. In addition to playing baseball as a student at UNC, he was one of 13 members of his class of more than 3000 students to be selected for a four-year leadership training program as a North

Carolina Fellow during which time he attended the Center for Creative Leadership in Greensboro, North Carolina. At UNC he also received the Ciba-Geigy Community Service Award for his leadership of the Student Health Action Coalition (SHAC, the oldest student-run free clinic in the United States) and the Holderness Fellowship for his research accomplishments in the Schools of Medicine and Public Health. He was one of the two doctoral students selected from more than fifty applicants nationally in 1985 to receive a National Center for Health Services Research Doctoral Dissertation Research Grant Award to support his dissertation research in the Department of Epidemiology in the UNC School of Public Health.

David moved to Rochester, Minnesota in 1983 to train in internal medicine at the Mayo Clinic where he started Mayo's first evidence-based medicine journal club and chaired the Mayo Internal Medicine Residents' Graduate Education Committee. After meeting his wife in 1985 while they were internal residents at Mayo and their subsequent marriage in 1986, David accepted a position to join the Mayo staff where he developed the Mayo Section of Health Services Evaluation and was promoted over two years from Senior Associate Consultant to Consultant and over four years from assistant professor to associate professor. He formulated with Denis Cortese, then Chair of the Mayo Clinical Practice Committee and subsequently CEO of Mayo Foundation, the first Mayo institutional quality improvement resource and led Mayo's participation in the RAND/Academic Medical Center Consortium/AMA Clinical Appropriateness Initiative. While at Mayo, David was one of the two nominees selected from more than fifty junior faculty nationally to receive in 1990 the first Merck/Society for Epidemiologic Research Clinical Epidemiology Fellowship award which, in addition to an R01 from the National Institutes of Health (HL 24326), funded his ground-breaking work that clarified the natural history of abdominal aortic aneurysms, characterized the uncertainty among clinical experts pertaining to which patients might benefit from elective abdominal aortic aneurysm surgery and led to the first randomized controlled trial of elective abdominal aortic aneurysm surgery conducted among more than 1200 patients randomized across 12 Veterans Affairs medical centers across the United States.

David moved to the University of Virginia in 1991 as his wife pursued a neuro-oncology fellowship there and David developed, through the guidance of Don Detmer, the University of Virginia Senior Vice President for Health Sciences, the Kerr White Institute for Health Services Research of which the University of Virginia was a founding member. In recognition of his ongoing research accomplishments, he received in 1993 the University of Virginia Institutional Academic Research Award. In 1994 David was recruited to Emory University where he further developed the Kerr White Institute as a national resource with members that included Peer Review Organizations from six states (Colorado, Connecticut, Georgia, Oklahoma, Rhode Island and Virginia), four universities (Emory, Morehouse, Medical College of Georgia and the University of Virginia) and the then five world's largest pharmaceutical companies (Lilly, Merck, Pfizer, Pharmacia & Upjohn and Smith-Kline Beecham). Among the accomplishments of the Institute under David's leadership as president, in 1998 four (Colorado, Connecticut, Oklahoma and Virginia) of the Institute's five PRO members won four of the six national HCFA Medicare Clinical Area Service contracts to lead the national development of quality of care measure and improvement strategies for the clinical topics that comprised the founding measures for the Core Measure Program of the Joint Commission. In recognition of his personal accomplishments while a professor with tenure of medicine and epidemiology at Emory, David received in 1995 the Alice S. Hersh New Investigator Award of Academy Health (formerly the Association for Health Services Research) as the outstanding health care researcher in the United States under age forty. In 1999 he was elected to a two-year term as president of the International Society for Quality in Health Care (ISQua). While he was ISQua president, he led the development, in part through conference grants from the Agency for Health Care Quality and Research, of the highly successful ISQua Performance Indicators Program.

In 1999 David was recruited to Baylor Health Care System (BHCS) in the Dallas-Ft. Worth, Texas area as BHCS's first Chief Quality Officer. In that capacity he was responsible for designing, implementing and

evaluating clinical quality improvement initiatives for an integrated delivery system with 15 hospitals, 80 ambulatory care centers, 500 employed and 4,000 affiliated physicians, 18,000 employees and an annual operating budget over \$5 billion. Receiving several regional and national awards for its health care improvement accomplishments under David's leadership, including the 2007 Leapfrog Patient-Centered Care Award and the 2008 National Quality Healthcare Award of the National Quality Forum, BHCS ranked 2nd among more than 250 multi-hospital health care systems across the United States in overall quality of care based on an analysis by Dr. Maulik Joshi, President, Health Research and Education Trust of the American Hospital Association in 2011. Comparable results were achieved through David's leadership across BHCS's extensive primary care network with improvement in the delivery of United States Preventive Services Task Force recommended adult clinical preventive services from 37% in 1999 to 93% in 2006 and receipt of the 2010 Preeminence Award of the American Medical Group Association. During his time as the BHCS CQO, David continued his training in quality improvement and management, completing the Intermountain Health Care's Mini-ATP rapid cycle clinical process improvement program and a Certificate in Medical Management from the University of Texas - Dallas School of Business and the University of Texas Southwestern School of Medicine. Building upon the success of BHCS in the health care quality improvement arena under David's leadership, BHCS launched in July 2011 an externally focused health care quality improvement resource, the STEEEP Global Institute, appointing David as President of that entity which included as initial clients several health care systems across the United States, China, France and Italy.

David has published more than 200 peer-reviewed manuscripts, is a frequent reviewer for the *New England Journal of Medicine* and the *Journal of the American Medical Association*, and serves on the editorial boards of *Health Services Research*, *Comparative Effectiveness Research* and the *Mayo Clinic Proceedings* (for which he serves as Healthcare Policy Section Editor) and as Associate Editor for *Mayo Clinic Proceedings: Innovations, Quality & Outcomes*. In addition to his health care operations leadership role as BHCS CQO, David also served as Executive Director for the BHCS Institute for Health Care Research and Improvement. His prior leadership roles include service as founding Head of the Mayo Section of Health Services Evaluation (1986-91) following training in internal medicine at the Mayo Graduate School of Medicine (1983-86), founding President, Kerr L. White Institute for Health Services Research (1991-1999), President (2001-2003) of the International Society for Quality in Health Care (ISQua) and Chair of AHRQ's Health Care Quality and Effectiveness Research study section (2006 – 2010). He has been a member of many NQF committees, including its National Quality Healthcare Award Blue Ribbon Review Panel and National Voluntary Consensus Standards for Hospital Care: Specialty Physician Measures which he co-chaired. He co-chaired the Joint Commission's Blood Management Performance Measures Project Technical Advisory Panel. David completed a three-year term as one of two physician members of the Board of Trustees of the Texas Hospital Association. His research efforts while at BHCS included an AHRQ grant with Josie Williams, M.D., M.M.M. of Texas A&M entitled Rural Hospital Collaborative for Excellence Using IT UC1 HS15431 (9/30/2004-9/29/2007 \$1.5M) that evaluated the implementation of advanced information technology in more than 60 rural and small community hospitals across Texas, including web-based business intelligence tools, internet connectivity and standardized national measures of patient safety and quality. The centerpiece of this research effort was a randomized trial of a rapid cycle process improvement education intervention among 47 of these hospitals to support health information technology implementation efforts with a focus on improving patient safety and quality. Many of the investigators that David recruited to the BHCS received their first federal peer-review funding as principal investigators under David's mentorship. These include Shahid Shafi, M.D., M.P.H., for his study of the relation between process and outcomes of care across Level I trauma centers, Neil Fleming, Ph.D., for his study of the financial and work flow effects of an electronic health record deployment in primary care settings and Giovanni Filardo, Ph.D., for his patient-level meta-analysis of data from the two randomized trials (U.S. VA and UK NHS) of watchful waiting versus immediate surgery for 4.0 – 5.4 cm infrarenal abdominal aortic aneurysms and the application of these findings to characterize the appropriateness of elective abdominal aortic aneurysm surgery across the

Dallas- Fort Worth Metroplex in collaboration with the Dallas-Fort Worth Hospital Council. David's AHRQ-funded clinical informatics research received in 2012 the John M. Eisenberg Article-of-the-Year award in *Health Services Research*. His books, *Achieving STEEEP Health Care* and *The Guide to Achieving STEEEP Health Care*, both received the Shingo Research Award for their contributions to operational excellence.

On October 1, 2013 David was appointed as the Chief Quality Officer of Baylor Scott & White Health, the largest not-for-profit health care system formed through the merger of Baylor Health Care System and Scott & White Health the largest health care system in Texas with 48 hospitals, > 1,000 patient care sites, 9,600 affiliated and/or employed physicians, > 48,000 employees, > 100 joint ventures and the Scott & White Health Plan and an annual operating budget of \$10 billion. He transitioned from his Baylor Scott & White Health leadership role in 2018 when he was recruited to guide the Mentice AB engagement of health care systems globally to create and implement partnerships to leverage the potential of Mentice's technology and solutions to reduce harm to patients and to reduce the cost of health care through ongoing operational application of clinical simulation to improve clinical practice. On August 28, 2019, he was elected to the Board of Mentice AB and, on that date, as required by Swedish law for board members of Swedish public companies, he relinquished his Mentice AB executive team employment role.

David received in 2008 the Distinguished Alumnus Award of the UNC School of Medicine which honors alumni and colleagues whose distinguished careers and unselfish contributions to society have brought honor to UNC and its medical school. In 2019 he received the H.A. Tyroler Distinguished Alumnus Award of the UNC Gillings School of Global Public Health. He is Adjunct Professor in the Department of Health Policy and Management of the UNC Gillings Global School of Public Health. David was named in 2015, 2016, 2017 and 2018 by Becker's Hospital Review as one of "50 Experts Leading the Field of Patient Safety". He served on the board of trustees of the UNC School of Public Health Foundation and now serves as a member of the UNC School of Public Health Capital Campaign Executive Committee and on the UNC Chancellor's Global Leadership Council. He served on the Board of Managers of The Heart Hospital Baylor Plano, the BSWH-Kessler/Select rehabilitation and long-term care joint venture board, and the High Value Health Care Collaborative board. He served on Ascension's Gulf Coast Health Ministry Board (and continues to serve as Quality Committee chair for that component of Ascension) and served on xG Health's Advisory Board associated with Geisinger Health System.

David lives in Dallas with his wife, Michela Caruso, M.D., a native of Rome and graduate with Honors of Università degli Studi di Roma "La Sapienza" and of the Mayo Graduate School of Medicine, who is a radiation oncologist, partner and former board member of Texas Oncology, the largest independent oncology practice in the world with more than 300 physician partners and 100 practice sites. They were married in 1986 and have two children. Elisa, a 2011 BA/MBA graduate of the University of Denver where she was a University Academic Scholar and Cherrington Global Scholar, is Marketing Director for MISA Imports, a wine and spirits company based in Dallas. Alessandro, a 2014 graduate in molecular biology and Italian of the University of Denver where he was also a Cherrington Global Scholar and a 2018 MBA graduate of Southern Methodist University where he was a Cox Scholar and Information Technology Operations Management Distinguished Scholar, is Senior Corporate Development Analyst for Press Ganey in Boston. Among other philanthropic commitments, David and Michela are Mayo Laureates and Morehead-Cain Scholarship Fund donors, previous funders of the endowment for SHAC and they have endowed a scholarship in honor of David's mentors, Edward H. Wagner and Kerr L. White, for dual degree students in the UNC Schools of Medicine and Public Health where David is a Capital Campaign Executive Committee member.

## **Academic and Professional Training**

1974 Graduation with Academic Distinction, The Lawrenceville School, Lawrenceville NJ  
1978 AB, Chemistry and Economics with Honors, University of North Carolina  
1983 MD, University of North Carolina School of Medicine  
1983, 1990 MSPH, PhD, Epidemiology, University of North Carolina School of Public Health  
1983-1986 Residency in Internal Medicine, Mayo Clinic, Rochester, Minnesota  
2002 Certificate in Medical Management, School of Management, University of Texas at Dallas and the University of Texas Southwestern Medical Center, Dallas  
2019-2021 MBA with Honors (Beta Gamma Sigma), UNC Kenan-Flagler Business School, Merit Fellowship

## **Certification and Licensure**

1984 Medical License, State of Minnesota, #0284635  
1986 American Board of Internal Medicine, #110824  
1992 Medical License, Commonwealth of Virginia, #0101048020

## **Employment History**

2019 - Board of Directors, Mentice AB, Appointed Initially October 2018, Elected to the Mentice AB public company board (MNTC Nordic NASDAQ) 28 August 2019  
2019 President, Mentice Inc. (Until 28 August 2019)  
2019 Executive Vice President and Chief Clinical Officer, Mentice AB (Until 28 August 2019)  
2013-2018 Senior Vice President and Chief Quality Officer, Baylor Scott & White Health  
2013-2018 President, STEEEP Global Institute, Baylor Scott & White Health  
2011-2013 President, STEEEP Global Institute, Baylor Health Care System  
1999-2013 Senior Vice President and Chief Quality Office, Baylor Health Care System, Dallas TX  
1999-2013 Executive Director, Institute for Health Care Research and Improvement, Baylor Health Care System, Dallas TX  
1994-1999 Director, Center for Clinical Evaluation Sciences, School of Medicine, Emory University  
1994-1999 Professor, Department of Medicine, School of Medicine, Emory University  
1994-1999 Professor, Department of Epidemiology, Rollins School of Public Health, Emory University  
1992-1999 President, Kerr L. White Institute for Health Services Research  
1992 Visiting Scientist, Department of Health Sciences Research, Mayo Clinic  
1991-1994 Associate Professor of Epidemiology, University of Virginia School of Medicine  
1991-1994 Senior Scholar and Director of the Health Data Center, Virginia Health Policy Research Center  
1991-1994 Associate Professor of Medicine, Division of General Medicine, Department of Medicine, University of Virginia School of Medicine  
1991 Associate Professor of Epidemiology, Mayo Medical School  
1989-1991 Head, Section of Health Services Evaluation, Mayo Clinic  
1988-1991 Consultant, Department of Health Sciences Research, Mayo Clinic  
1986-1988 Senior Associate Consultant, Department of Health Sciences Research, Mayo Clinic  
Section of Clinical Epidemiology 1986-1988, Section of Health Services Evaluation 1987-1988  
1986-1990 Assistant Professor of Epidemiology, Mayo Medical School  
1983-1986 Research Fellow, Department of Medical Statistics and Epidemiology, Mayo Clinic

1983-1986 Resident, Department of Internal Medicine, Mayo Clinic  
 1982-1983 Epidemiologic Consultant, Department of Ophthalmology, University of North Carolina School of Medicine, Chapel Hill NC  
 1982-1983 Study Coordinator, Chronotherapeutic Insulin Trial, Clinical Research Unit, North Carolina Memorial Hospital, Chapel Hill NC  
 1981-1983 Co-Investigator, Edgecombe County High Blood Pressure Control Program, Department of Epidemiology, University of North Carolina School of Public Health, Chapel Hill NC  
 1979-1980 Director, Student Health Action Committee Clinic, University of North Carolina School of Medicine, Chapel Hill NC  
 1977-1978 Research Assistant, Medical Utilization Review Committee, North Carolina Memorial Hospital, Chapel Hill NC  
 1976-1978 Academic Tutor, University of North Carolina Athletic Association, Chapel Hill NC  
 1976 Chemical Applications Software Programmer, Hewlett-Packard, Palo Alto CA

### Selected Honors

2021 M.B.A. with Honors (Beta Gamma Sigma), UNC Kenan-Flagler Business School  
 2019 H.A. Tyroler Distinguished Alumnus Award, UNC Gillings School of Global Public Health  
 2019 MBA@UNC Program Fellowship (Merit award to support MBA)  
 2018 Novant Health Distinguished Lecturer, UNC Gillings School of Global Public Health, Department of Health Policy and Management, University of North Carolina  
 2016 Stuart D. Cook, M.D. Master Educators' Guild Distinguished Rosenberg Lectureship, Rutgers Robert Wood Johnson Medical School  
 2015-2018 Becker's Hospital Review, one of "50 Experts Leading the Field of Patient Safety"  
 2015 Shingo Research and Professional Publication Award, for book, *The Guide to Achieving STEEEP Health Care*  
 2014 Shingo Research and Professional Publication Award, for book, *Achieving STEEEP Health Care*  
 2013 John M. Eisenberg 2012 Article-of-the-Year Award, *Health Services Research*  
 2011 Honorable Mention, Reitzenstein Prize, Best Article for 2010 *International Journal for Quality in Health Care*  
 2008 Distinguished Alumnus Award, University of North Carolina School of Medicine  
 1995 Honorable Mention, Reitzenstein Prize, Best Article for 1994 *International Journal for Quality in Health Care*  
 1995 Young Investigator Award, Association for Health Services Research  
 1993-1994 Institutional Academic Research Award, University of Virginia  
 1991 Fellow, American College of Angiology  
 1990-1993 Merck/Society for Epidemiologic Research Clinical Epidemiology Fellow  
 1990 Fellow, American College of Physicians  
 1985-1987 Fischbach Foundation Research Fellowship, Juvenile Diabetes Foundation International  
 1986 Sigma Xi, Mayo Chapter  
 1985 National Center for Health Services Research Doctoral Dissertation Research Grant Award  
 1985 American College of Physicians Associates Clinical Paper Competition Award  
 1982-1983 Holderness Medical Fellow, University of North Carolina School of Medicine  
 1981-1982 U.S. Public Health Service Traineeship, No. AH 00782-01, Department of Epidemiology, University of North Carolina School of Public Health  
 1981 University of North Carolina School of Medicine Foreign Travel Fellowship, Royal Maternity Hospital, Glasgow, Scotland

- 1980 Ciba-Geigy Community Service Award, University of North Carolina School of Medicine
- 1979 University of North Carolina School of Medicine Foreign Travel Fellowship, Lyme Hospital, Lyme Regis, Dorset, England
- 1978 John Motley Morehead Graduate Travel Fellowship, site visits to medical schools in Mexico, Puerto Rico and Europe attended by US citizens
- 1978 Honors Thesis, Department of Economics, University of North Carolina, Chapel Hill, North Carolina
- 1976 Order of the Old Well, Order of the Grail; University of North Carolina
- 1976 Phi Eta Sigma, Phi Beta Kappa; University of North Carolina
- 1974-1978 North Carolina Fellow, University of North Carolina
- 1974-1978 John Motley Morehead Scholar, University of North Carolina
- 1974 National Football Foundation Hall of Fame Scholar-Athlete Award, Delaware Valley Chapter (DE-NJ-PA)
- 1974 Graduation with Academic Distinction, The Lawrenceville School, Lawrenceville NJ
- 1974 Yale Aurelian Award (Outstanding Senior by student vote), The Lawrenceville School
- 1974 Edward S Brainard Award (Outstanding Senior by faculty vote), The Lawrenceville School
- 1973 Harvard Club of Boston Book Prize (Outstanding Junior by faculty vote), The Lawrenceville School

### **Academic Appointments**

- 2018- Adjunct Professor, Department of Health Policy and Management, UNC Gillings School of Global Public Health, University of North Carolina at Chapel Hill
- 1994-1999 Professor (with tenure), Department of Medicine, School of Medicine, Emory University
- 1994-1999 Professor (joint appointment), Department of Epidemiology, Rollins School of Public Health, Emory University
- 1991-1994 Associate Professor (with tenure), Epidemiology and Medicine, School of Medicine, University of Virginia
- 1990-1991 Associate Professor of Epidemiology, Mayo Medical School
- 1986-1990 Assistant Professor of Epidemiology, Mayo Medical School

### **Educational Responsibilities**

#### Teaching and Curriculum Development

Baylor Health Care System/Baylor Scott & White Health

- 2014-2018 Steering Committee, STEEEP Academy
- 2005-2008 Principal Investigator, Randomized Trial of ABC-B, 47 Rural & Small Hospitals across Texas
- 2003-2014 Steering Committee, Accelerating Best Care at Baylor (ABC-B), Rapid Cycle Health Care Process Improvement Educational Curriculum

Emory University

- Spring 1999 Tutorial Leader, Health Care Technology Assessment, Rollins School of Public Health
- Spring 1998 Faculty, A Population-based Approach to Health Care Research and Practice, Atlanta

University of Virginia

- 1993-1994 Faculty, University of Virginia School of Medicine Epidemiology Course (Medicine 632)

1993-1994 Faculty, University of Virginia Graduate Program in Epidemiology  
1992-1994 Faculty, University of Virginia General Internal Medicine Training Fellowship

#### Mayo Medical School

1990-1991 Course Director, Mayo Graduate School of Medicine, Designing Clinical Research (HSR5100)  
1988-1991 Director, General Internal Medicine Resident Journal Club  
1988-1991 Member, Advisory Committee on Instructional Resources  
1988-1989 Faculty, Mayo Graduate School of Medicine, Biostatistics 5-825 Introductory Statistics III, Epidemiologic Features of Prognostic and Etiologic Research  
1987 Member, Mayo Medical School First Year Curriculum Committee  
1986-1991 Faculty, Mayo Medical School Medical Student Clinical Epidemiology Course, Course Director  
1986-1991 Member, Preventive Medicine Residency Advisory Committee  
1985-1986 Chair, Internal Medicine Residents' Graduate Education Committee, Mayo Clinic  
1985-1986 Member, General Medicine Training Committee, Mayo Clinic  
1985-1986 Member, Internal Medicine Graduate Education Committee, Mayo Clinic  
1984-1985 Member, Internal Medicine Subcommittee for Undergraduate Education, Mayo Clinic  
1983-1986 Member, Internal Medicine Residents' Graduation Education Committee, Mayo Clinic

#### Other

1998 Faculty, Health Services Research, Medical College of Georgia, Augusta GA  
1993 Member, Health Services Research Training Advisory Committee, Agency for Health Care Policy and Research  
1991-1995 Member, Scientific Advisory Committee, Libero Istituto Universitario Campus Bio-Medico, Rome, Italy  
1991-1994 Visiting Professor in Clinical Epidemiology, University of Chieti, Chieti, Italy

#### Other Intramural Service

##### Baylor Health Care System/Baylor Scott & White Health (Selected /1999-Present)

2012-2018 Member, Board of Managers, Select-Baylor Scott & White Health Rehabilitation Services Joint Venture  
2012-2017 Chair, STEEEP Governance Council, Baylor Health Care System/Baylor Scott & White Health (Oversees organization's Quality Pillar and Service Pillar goal setting, performance and improvement tactics)  
2009-2018 Member, Board of Managers, The Heart Hospital Baylor Plano  
2009-2010 Chair, Research Misconduct Committee, Baylor Research Institute  
2004-2012 Member, Baylor Research Institute Data Monitoring and Safety Board  
2001-2002 Chair, Baylor Health Care System Ad Hoc Strategic Planning Committee to Align and Expand Research to Advance Best Care  
2000-2004 Chair, Data Safety and Monitoring and Safety Committee, House Calls and Hospitalization in the Homebound Elderly RCT, IRB #096-060, Principal Investigator: Ziad Haydar MD  
2000 Chair, Baylor Health Care System Board of Trustees Ad Hoc Quality Measurement Review Committee

##### Emory University (1994-1999)

- 1998-1999 Member, Steering Committee, John A Hartford Foundation Southeast Center of Excellence in Geriatric Medicine
- 1997 Participant, Emory Healthcare Clinical Strategic Planning Implementation Phase Retreat, Information Systems Subgroup, November 8, 1997
- 1996-1999 Member, Department of Health Policy and Management Chair Search Committee, Rollins School of Public Health
- 1996-1997 Member, Internet Services Committee, Emory University System of Health Care
- 1995-1997 Member, Department of Rehabilitation Medicine Chair Search Committee, Emory University School of Medicine
- 1995-1996 Member, General Clinical Research Center Advisory Council, Emory University School of Medicine
- 1995-1996 Member, Committee on Reengineering the Clinical Research Process, Emory University School of Medicine
- 1994-1999 Member, Committee on Appointments and Promotions, Emory University School of Medicine
- 1994-1995 Member, Bio-Medical Informatics Committee, Emory University School of Medicine
- 1994-1995 Member, Emory Clinic 2000 Information Services Strategic Planning Team, Emory Clinic

University of Virginia (1991-1994)

- 1993-1994 Member, Advisory Board, Academic Computing Center for the Health Sciences Center, University of Virginia
- 1992-1994 Faculty Associate and Senior Fellow, Southeastern Rural Mental Health Research Center, University of Virginia
- 1992-1994 Associate Director, Cancer Prevention and Control, University of Virginia School of Medicine Cancer Center
- 1992-1994 Member, Advisory Board, University of Virginia Health Policy Research Center
- 1992-1994 Member, Information Sciences Council, University of Virginia Health Sciences Center
- 1991-1994 Faculty Associate, Center on Aging and Health
- 1991-1994 Senior Scholar and Director of the Health Data Center, Virginia Health Policy Research Center

Mayo Clinic (1983-1991)

- 1990-1991 Member, Data Safety and Monitoring Committee, Mayo Asymptomatic Carotid Endarterectomy Trial
- 1990 Member, Mayo Clinical Practice Committee, Subcommittee on Health Services Evaluation
- 1990 Chair, Clinical Epidemiology Faculty Search Committee
- 1989-1991 Member, Department of Health Sciences Research Executive Committee
- 1989-1991 Head, Section of Health Services Evaluation
- 1988-1991 Member, Division of General Internal Medicine Research Committee
- 1988-1991 Member, Department of Health Sciences Research, Research Committee
- 1988-1991 Member, Editorial Board, *Mayo Clinic Proceedings*
- 1988-1989 Member, Mayo Quality Assurance Committee
- 1987-1991 Member, Mayo Breast Cancer Study Group
- 1987-1991 Member, Mayo Cancer Control Committee
- 1987-1991 Member, Executive Committee, Mayo Cancer Center
- 1986-1987 Member, Department of Medical Statistics and Epidemiology Research Committee

## Selected Extramural Service

2020	Chair, COVID19 Response Program Grant RFP, Andy Hill CARE Fund, Seattle, Washington.
2019	Learning Community Member, Revolutionizing the Health Service Research Paradigm Learning Community, AcademyHealth and Robert Wood Johnson Foundation
2018	Panelist, A Healthier Body and Bottom Line-How Innovation Will Transform Health Care, Morehead-Cain Alumni Forum, 21 October 2018, Chapel Hill, North Carolina
2016-2018	Member, High Value Healthcare Collaborative Board and Executive Committee
2016-present	Member, Ascension Gulf Coast Health System Board of Directors (Quality Committee Chair)
2016-2018	Member, Advisory Board, xG Health
2016-present	Council on Accreditation of Healthcare Management Education, Blue Ribbon Panel, Excellence in Quality Improvement Education Annual Award
2016-present	Board of Advisors, Robbins Institute for Health Policy and Leadership, Baylor University
2014	Member, Mentice Inc. US Advisory Board
2014-2017	Member, National Advisory Council, AHRQ
2014	Member, Advisory Committee, RFA-HS-008 Program Announcement (Accelerating the Dissemination and Implementation of PCOR Findings)
2013-present	Member, ISQua Expert, resource for ISQua programs and other safety and qualities activities
2013-2014	Chair, Centers for Education and Research on Therapeutics Steering Committee, AHRQ
2012	Co-chair, Indicator Summit Strengthening the Information Infrastructure for Quality, International Society for Quality in Health Care, 21 October 2012, Geneva
2012	Chair, Special Emphasis Panel, RFA-HS-12-004 (Building the Science of Public Reporting)
2012	Chair, ZRG1 BBBP-T 70 R / PCROI 2 Review Panel, PCORI
2011-2013	Chair, Clinical Bullpen, Leadership Institute
2011, 2012	Member, Dick Davidson Quality Milestone Award for Allied Association Leadership Committee, American Hospital Association
2011-2012	Chair-Elect, Centers for Education and Research on Therapeutics Steering Committee, AHRQ
2009-2011	Co-Chair, Joint Commission's Blood Management Performance Measures Project Technical Advisory Panel
2009-2013	Member, Board of Trustees, The Lawrenceville School
2008	Reviewer, Health Research Board, Ireland (June 2008)
2008	Member, Planning Committee, National Quality Forum's (NQF's) project, Towards a Comprehensive Diabetes Measure Set – Episodes of Care
2007-2016	Member, School of Public Health Foundation Board, University of North Carolina-Chapel Hill
2007-2010	Member, Board of Trustees, Texas Hospital Association, (1 of 2 physician board members)
2007	Chair, Paper and Poster Sessions, Abstract Reviewer, 24th International Conference of the International Society for Quality in Health Care, Boston, September 30 - October 3, 2007.
2007	Member, Scientific Committee, National Conference on Small Numbers: Challenges and Innovations in Evaluation of Quality of Care Measures Based on Small Counts, Dallas, Texas, March 28-29, 2007
2006-2007	Co-Chair, Steering Committee, NQF National Voluntary Consensus Standards for Hospital Care: Specialty Physician Measures
2006-2010	Chair, AHRQ Health Care Quality and Effectiveness Research Study Section
2006	Chair, Paper and Poster Sessions, Abstract Reviewer, 23rd International Conference of the International Society for Quality in Health Care, London, England, October 22-25, 2006.
2006	Member, National Quality Forum's National Quality Healthcare Award Blue Ribbon Review Panel (charged with redesign of the NQF's National Award Application and Review Process)

- 2005-2007 Member, NQF Standardizing Ambulatory Care Performance Measures, Composite Measures Technical Advisory Panel
- 2005-2006 Member, AHRQ Quality Indicators Composite Measure Workgroup for the Prevention Quality Indicators
- 2005 Reviewer, Special Emphasis Panel (Member Conflict Review), Health Services Organization and Delivery Study Section, NIH, December 1, 2005
- 2005 Reviewer, Special Emphasis Panel (Member Conflict Review), Health Services Organization and Delivery Study Section, NIH, February 23, 2005
- 2005 Reviewer, Alberta Heritage Foundation for Medical Research, Alberta, Canada, January 2005
- 2003-2005 Member, Cancer Data and Methods Panel, NQF Quality of Cancer Care Measures Project
- 2003-2004 Full Member, Health Services Organization and Delivery Study Section, NIH
- 2003 Chair, Center for Scientific Review Special Emphasis Panel, Health Services Organization and Delivery, NIH, December 1, 2003
- 2003 Panelist, Session: The Unique Role of the International Professional Society in Advancing Health Services Research, 5th International Conference on the Scientific Basis of Health Services, Washington DC, September 21, 2003
- 2003 Chair, Session: Nurse Staffing and Health Care Quality: Evidence and Implications, 5th International Conference on the Scientific Basis of Health Services, Washington DC, September 21, 2003
- 2003 Member, Conference Planning and Program Committee, 20<sup>th</sup> International Conference of the International Society for Quality in Health Care, Dallas TX, November 2-5, 2003.
- 2002-2004 Full Member, Health Services Organization & Delivery (formerly SNEM-4) Study Section, NIH
- 2002-2003 Full Member, Social Sciences, Nursing, Epidemiology and Methods (SNEM-4) Study Section, NIH
- 2002 Reviewer, Swiss National Science Foundation, Division of Biology and Medicine
- 2002 Member, Conference Planning and Program Committee, 19<sup>th</sup> International Conference of the International Society for Quality in Health Care, Paris, France, November 2-5
- 2002 Member, Planning Committee, International Society for Quality in Health Care 4<sup>th</sup> Annual Quality of Care Indicators Summit, Paris, France, November 1-2, 2002
- 2002 Reviewer, Social Sciences, Nursing, Epidemiology and Methods IRG (SNEM-4), NIH, February 25-26, 2002
- 2001-2008 Chair, Dallas-Fort Worth Business Group on Health, Patient Safety Initiative Steering Committee
- 2001-2003 President, International Society for Quality in Health Care
- 2001 Member, Conference Planning and Program Committee, 18<sup>th</sup> International Conference of the International Society for Quality in Health Care, Buenos Aires, Argentina, October 2-5, 2001
- 2001 Chair, Planning Committee, International Society for Quality in Health Care 3<sup>rd</sup> Annual Quality of Care Indicators Summit, Buenos Aires, Argentina, October 1-2, 2001
- 2001 Reviewer, Social Sciences, Nursing, Epidemiology and Methods IRG (SNEM-4), NIH, June 25-26, 2001
- 2001 Panelist, Marche Regional Health Care Conference, Ancona, Italy, June 21-22
- 2000-2004 Member, Selection Committee, Annual Manuscript Prize for the *Journal of the International Society for Technology Assessment in Health Care*
- 2000 Member, MedUnite Medical and Group Practice Advisory Group
- 2000 Reviewer, Social Sciences, Nursing, Epidemiology and Methods IRG (SNEM-4), NIH, October 26-27, 2002
- 2000 Reviewer, AHRQ/Special Emphasis Panel for the RFA “Systems-Related Best Practices to Improve Patient Safety,” Rockville MD, July 27-28, 2000

- 2000 Member, Conference Planning and Program Committee, 17<sup>th</sup> International Conference of the International Society for Quality in Health Care, Dublin, Ireland, September 13-15, 2000
- 2000 Reviewer, Enhancing Data Systems to Improve the Quality of Cancer Care, Maria Hewitt and Joseph V. Simone, Editors, National Cancer Policy Board, National Research Council
- 2000 Member, Texas Health Resources System-Wide CME Advisory Council
- 2000 Moderator, Panel on Improving Health Care Quality, 2nd John Motley Morehead Scholar Alumni Forum, University of North Carolina at Chapel Hill, Chapel Hill NC, April 29, 2000
- 2000 Reviewer, Social Sciences, Nursing, Epidemiology and Methods IRG (SNEM-4), NIH, February 21-22, 2000
- 1999-2000 Co-chair, Quality Committee, Dallas-Fort Worth Business Group on Health
- 1999 Reviewer, Social Sciences, Nursing, Epidemiology and Methods IRG (SNEM-4), NIH, July 26, 1999
- 1999 Reviewer, Special Emphasis Panel, Agency for Health Care Policy and Research, July 21, 1999
- 1999 Faculty, AHCPR/Commonwealth Fund, Blue Cross/Blue Shield Health Services Research Conference, Washington DC, February 2, 1999
- 1998-2001 Member, Board of Directors, International Society for Technology Assessment in Health Care
- 1998 Chair, ISQua session “Implementing Guidelines into Clinical Practice,” 15th Annual Meeting of the International Society for Quality in Health Care Assessment, Budapest, Hungary October 8, 1998
- 1998 Member, Evaluation and Research Advisory Committee, “Improving Chronic Illness Care,” Robert Wood Johnson Foundation, 1998
- 1998 Chair, Decision Making Session, International Society for Technology Assessment in Health Care, Ottawa, Ontario, Canada, June 10, 1998
- 1998 Expert, “Meet the Expert” Session, International Society for Technology Assessment in Health Care, Ottawa, Ontario, Canada, June 9, 1998
- 1998 Reviewer, Aetna Foundation Quality Care Research Fund, Hartford, CT, August 18-19
- 1998 Reviewer, Agency for Health Care Policy and Research Dissertation Grant Reviews, May 7-8,
- 1998 Member, Scientific Committee, 15th Annual Meeting of the International Society for Quality in Health Care, Budapest, Hungary, October 7-10
- 1997-2000 Member, Scientific Committee, Catalan Agency for Health Technology Assessment
- 1997-1999 Member, Aetna Foundation Academic Medicine and Managed Care Forum Outcomes Research Working Group
- 1997-1999 Member, External Advisory Committee, Center for Healthcare Effectiveness Research, Wayne State University, Detroit MI
- 1997 Board of Counselors, Baxter Foundation Health Services Research Prize
- 1997 Abstract Reviewer, Joint Commission on Accreditation of Healthcare Organization, International Congress on Performance Measurement and Improvement in Health Care, Chicago IL, November 11-15, 1997
- 1997 Member, Scientific Program Committee, Joint Commission on Accreditation of Healthcare Organization International Congress on Performance Measurement and Improvement in Health Care, Chicago IL, November 11-15, 1997
- 1997 Session Moderator, “Assessing the Appropriateness of Care,” Joint Commission on Accreditation of Healthcare Organization, International Congress on Performance Measurement and Improvement in Health Care, Chicago IL, November 15, 1997
- 1997 Co-Chair, Planning Committee, American Cancer Society/Kerr L. White Institute Conference “Purchasing Oncologic Services.” Chicago IL, September 11-12, 1997
- 1997 Abstract Reviewer, Association for Health Services Research Annual Meeting, Chicago IL, June 15-17, 1997

- 1997 Reviewer, Epidemiology and Information Centers Program Initiative, Department of Veterans Affairs, Washington DC, June 5-6, 1997
- 1997 Chair, Session: "Effectiveness Research in Clinical Practice." 13th Annual Meeting of the International Society for Technology Assessment in Health Care, Barcelona, Spain, May 26
- 1997 Abstract Reviewer-13th Annual Meeting of the International Society for Technology Assessment in Health Care Meeting, Barcelona, Spain, May 25-28, 1997
- 1997 Participant, Veterans Affairs Integrated Service Network 7 (Alabama, Georgia, South Carolina) Research Retreat, Charleston SC, May 12-13, 1997
- 1997 Reviewer, Aetna Foundation Quality Care Research Fund
- 1996-1999 Member, Health and Public Policy Committee, American College of Physicians, Georgia Chapter
- 1996 Member, Steering Committee, School of Public Health Loyalty Fund, University of North Carolina
- 1996 Member, Scientific Advisory Board, Fondazione SmithKline "Management, Economics and Health Policy" Publication Series
- 1996 Member, SmithKline Beecham Thrombosis Advisory Board
- 1996 Reviewer, Cardiac Arrhythmia PORT (Patient Outcome Research Team), Agency for Health Care Policy and Research, June 23- 24, 1996
- 1996 Chair, Policy Roundtable: Health Care Quality Management Research Partnerships among Corporate and Academic Entities: Opportunities and Pitfalls, 13th Annual Meeting of the Association for Health Services Research, Atlanta GA, June 10, 1996
- 1996 Member, Planning Committee, Association for Health Services Research Annual Meeting, Atlanta GA, June 9-11, 1996
- 1996 Reviewer, Grants Review Branch, Division of Extramural Activities, National Cancer Institute, March 26, 1996
- 1996 Member, Merck Congestive Heart Failure Care Standards Advisory Board, 1996
- 1996 Co-Chair, Abstract Review Subcommittee for Prevention Section, Annual Meeting of the Society for General Internal Medicine, Washington DC
- 1995-2005 Member, Board of Directors, International Society for Quality in Health Care, President (2001-2003)
- 1995-1999 Member, External Advisory Group, Morehouse Medical Treatment Effectiveness Center
- 1995-1997 Chairperson, Advisory Council of the International Society for Quality in Health Care
- 1995 Reviewer, PORT-II (Patient Outcome Research Team) Special Emphasis Panel, Agency for Health Care Policy and Research, October 26, 1995
- 1995 Reviewer, PORT-II (Patient Outcome Research Team) Special Emphasis Panel, Agency for Health Care Policy and Research, June 15-16, 1995
- 1995 Chairperson, Issues Workshop: Medical Effectiveness and Patient Outcomes Research: What Works in Health Care, Annual Meeting of the Association for Health Services Research, Chicago IL, June 4-6, 1995
- 1995 Invited Panelist, Policy Roundtable: Academic Health Centers Manage to Change, Annual Meeting of the Association for Health Services Research, Chicago IL, June 4-6, 1995
- 1995 Reviewer, PORT-II (Patient Outcome Research Team) Special Emphasis Panel, Agency for Health Care Policy and Research, March 9-10, 1995
- 1994-2000 Member, Advisory Board, Canadian Randomized Trial of Propranolol for Management of Patients with Small Abdominal Aortic Aneurysms
- 1994-1997 Research Fellow, Cecil G Sheps Center for Health Services Research, University of North Carolina at Chapel Hill
- 1994 Invited Panelist, Role of Epidemiology in Health Care Reform, Annual Meeting of the American College of Epidemiology, Washington DC, September 13, 1994

- 1994 Invited Presenter, Workshop on the Control of Abdominal Aortic Aneurysm, Health Canada Bureau of Chronic Disease Epidemiology, Ottawa, May 25-26, 1994
- 1994 Invited Discussant, Development of a Report Card for Mental Health Services, Mental Health Program of the Carter Center of Emory University, April 4, 1994
- 1994 Reviewer, Special Study Section for Review of PORT-II (Patient Outcome Research Team) Grant Applications, Agency for Health Care Policy and Research, March 2-4
- 1993-2005 Member, Advisory Panel, Battelle/Centers for Disease Control and Prevention Diabetic End-Stage Renal Disease Program
- 1993-1994 Managed Care Advisory Panel, Blue Cross/Blue Shield of Virginia
- 1993-1994 Member, Planning Committee, VA Cooperative Study # 417: The Natural History of Large Abdominal Aortic Aneurysms Study
- 1993-1994 Co-Chair, Hospital Outcomes Study Committee, Virginia Health Information
- 1993-1994 Extramural Advisor, Cancer Control Program, Massey Cancer Center, Medical College of Virginia
- 1993 Invited Presenter, Conference on Appropriateness of Medical Care in Europe, Lausanne, Switzerland, November 1-2, 1993
- 1993 Invited Participant, National Research Council Meeting on Information Infrastructure and Health Care, National Academy of Sciences, Washington DC, October 5-6
- 1993 Invited Participant, Glaxo Inc., Forum on Product Life Cycle Planning, Research Triangle Park, North Carolina, September 28-29, 1993
- 1993 Reviewer, Special Study Section for Review of PORT (Patient Outcome Research Team) Grant Applications and other Clinically Complex Grant Applications, Agency for Health Care Policy and Research, June 29, 1993
- 1993 Chair, Panel on Medical Outcomes and Effectiveness, Ninth Annual Meeting of the International Society for Technology Assessment in Health Care, Sorrento, Italy, May 25, 1993
- 1992-2003 Member, Executive Committee, Veterans Affairs Cooperative Study # 379: The Aneurysm Detection and Management (ADAM) Trial
- 1992-1995 Consultant, Regional Health Care Technology Assessment Unit, Unità Locale Socio Sanitaria, N. 21-Padova, Regione del Veneto, Italy
- 1992-1994 Research Associate, Cecil G Sheps Center for Health Services Research, University of North Carolina at Chapel Hill
- 1992-1993 Member, Planning Committee, Patient Level Database for the Commonwealth of Virginia (Virginia Health Information)
- 1992-1993 Member, AMA/HCFA Uniform Clinical Data Set (UCDS) Advisory Panel
- 1992 Invited Presenter, Forum on Clinical Practice Guideline Development Methods, Agency for Health Care Policy and Research, December 13-16, 1992
- 1992 Reviewer and Chair, Special Study Section for Review of PORT (Patient Outcome Research Team) Grant Applications and other Clinically Complex Grant Applications, Agency for Health Care Policy and Research, November 23, 1992
- 1992 Associate, Williamson Institute, Richmond VA
- 1991-1997 Member, Steering Committee, Stroke Prevention Patient Outcome Research Team (PORT)
- 1991 Member, American Medical Association Clinical Appropriateness Initiative Ad Hoc Advisory Panel
- 1991 Selection Committee Chair, Junior Faculty Award, the 14th Annual National Meeting of the Society of General Internal Medicine, Seattle WA, May 1991
- 1991 Session Chair, Outcomes Session, the 14th Annual National Meeting of the Society of General Internal Medicine, May 2, 1991

- 1991 Abstract Reviewer, Clinical Epidemiology, the 14th Annual National Meeting of the Society of General Internal Medicine
- 1991 Extramural Reviewer, Meyer Memorial Trust, Portland OR April 1991
- 1991 Extramural Reviewer, Health Services Research Committee, Medical Research Council, London, England, November 1990, April 1991
- 1990-1993 Consultant, Canadian Small Abdominal Aortic Aneurysm Randomized Trial
- 1990-1993 Member, Health Care Technology Study Section, Agency for Health Care Policy and Research
- 1990-1991 Member, Planning Committee, Veterans Affairs Cooperative Study # 379: The Aneurysm Detection and Management (ADAM) Trial
- 1990 Invited Presenter, Workshop on Health Services Research in a Multi-Institution Consortium, the Seventh Annual Meeting of the Association for Health Services Research and the Foundation for Health Services Research, June 17-19, 1990
- 1990 Session Chair, Transplantation and Complications 1, the 50th Annual Scientific Session Meeting of the American Diabetes Association, June 17, 1990
- 1990 Reviewer, Exploratory Centers Grants on the Health and Effective Functioning of Older Rural Population, NIH, June 12-13, 1990
- 1990 Extramural Reviewer, Abdominal Aortic Aneurysm Epidemiology Grant Application to the Wellcome Trust, London, England, May 18, 1990
- 1990 Session Chair, Diabetes and Metabolic Factors, the 30th Annual Conference on Cardiovascular Disease Epidemiology, American Heart Association, March 29-31, 1990
- 1990 Invited Participant, National Institute on Aging (NIA)/Kaiser Permanente Compression of Morbidity Conference, March 18-20, 1990
- 1990 Invited Participant, EURODEM/NIA/WHO Workshop on Risk Factors for Alzheimer's disease, Rotterdam, January 26-27, 1990
- 1989-1991 Member, Technical Advisory Board, Minnesota Diabetes Surveillance Project
- 1989-1991 Member, Advisory Board, Centers for Disease Control Diabetes Translation Center
- 1989 Special Reviewer, Epidemiology and Chronic Disease Study Section 1, NIH, October 11-12, 1989
- 1989 Invited Participant, Second International Symposium on Kidney Disease of Diabetes Mellitus, NIH, March 2-3, 1989
- 1988-1996 Member, RAND/Academic Medical Center Consortium Clinical Appropriateness Initiative Working Group
- 1988-1991 Mayo Representative, Health Services Research Committee, Academic Medical Center Consortium
- 1986-1991 Member, Minnesota Diabetes Steering Committee

### **Membership in Professional Societies**

- 1991 Fellow, American College of Angiology
- 1990 Fellow, American College of Physicians
- 1989-present Member, Association for Health Services Research, Academy Health
- 1989-present Member, Society for Medical Decision Making
- 1988-2003 Member, International Society for Technology Assessment in Health Care
- 1987-present Member, Society of General Internal Medicine
- 1987 Member, American College of Physicians
- 1987 Member, Epidemiology Council, American Heart Association
- 1986 Member, Society for Research and Education in Primary Care Internal Medicine
- 1984-present Member, American Public Health Association

1984 Member, International Epidemiology Association  
 1984 Member, Society for Epidemiologic Research  
 1983-present Member, American Medical Association  
 1983-1991 Member, Minnesota Medical Association - Delegate 1986  
 1983-1991 Member, Zumbro Valley Medical Association  
 1983-1987 Associate, American College of Physicians  
 1983-1984 Member, Zumbro Valley Medical Relations Committee

## Editorial Boards and Review Service

*American Journal of Epidemiology*  
*American Journal of Managed Care*  
*American Journal of Medicine*  
*American Journal of Preventive Medicine*  
*Annals of Internal Medicine*  
*Arthritis and Rheumatism*  
*Baylor University Medical Center Proceedings* (Associate Editor, 1999-2007)  
*Clinical Performance and Quality Health Care*  
*Comparative Effectiveness Research* (Editorial Board, 2011 – present)  
*Diabetes*  
*Diabetes Care*  
*Effective Clinical Practice*  
*Gastroenterology*  
*Health Affairs*  
*Health Services Research* (Editorial Board, 1994-present)  
*International Journal of Care Pathways* (Editorial Board, 2009 – 2013)  
*International Journal of Epidemiology*  
*International Journal for Quality in Health Care* (Editorial Board, 1994-2009)  
*International Journal of Technology Assessment in Health Care*  
*Journal of the American Medical Association*  
*Journal of Clinical Epidemiology*  
*Journal of General Internal Medicine*  
*Journal of Rural Health*  
*Journal of Rheumatology*  
*Journal of Vascular Surgery*  
*Mayo Clinic Proceedings* (Editorial Board, 1988-1991, 2008-present; Healthcare Policy Section Editor, 2011 – present; 2016 - present, Associate Editor *Mayo Clinic Proceedings Innovation, Quality & Outcomes*)  
*Medical Care*  
*Neurologist*  
*New England Journal of Medicine*  
*Physicians' Information Education Resource (PIER), American College of Physicians*  
*Quality and Safety in Health Care*  
*Western Journal of Nursing*

## Research and Educational Initiative Funding History

NIH (3OT2OD024610-01S1)

\$1,890,835

9/27/16-02/28/18

Trans-American Consortium of the Health Care Systems Research Network for the Precision Medicine Initiative Cohort Program		
Role: Co-Investigator (Filardo, G, Site PI)		
CMS Healthcare Innovation Award	\$850,000	5/8/12-5/7/15
The High Value Healthcare Collaborative: Engaging Patients to Meet the Triple Aim		
Role: Executive Committee Member (Masica A, PI)		
AHRQ (HSA2902010000231) Variable/Task Order Specific		7/01/10 - 6/30/15
Accelerating Change and Transformation in Organizations and Networks (ACTION II)		
Role: BHCS/Site PI (Intermountain Healthcare Prime Contractor)		
Merck Company Foundation	\$1,686,061	1/01/09 – 12/30/14
Community Based Partnerships: Addressing Diabetes Disparities in Dallas County		
Role: Co-investigator		
NIH (1R01HL103683-01A1)	\$2,360,758	7/01/11 - 6/30/14
New-onset Post-CABG Atrial Fibrillation		
Role: Co-investigator (Filardo G, PI)		
AHRQ (1 K99 HS022431-01) Career Development	\$290,378	7/01/13-6/30/14
Analysis and Dissemination of Patient-Centered Outcomes and its Impact on Patient and Physician Shared Decision-Making		
Role: Mentor (McCarthy I, PI)		
AHRQ (1R21HS020696-01)	\$299,985	6/01/11 - 5/31/13
Impact of Health IT Implementation on Diabetes Process and Outcome Measures in a Primary Care Setting		
Role: PI		
AHRQ (1R01HS018576-01A1)	\$714,191	7/01/10 - 4/30/13
A Large Population-Based Study of Surgery for Abdominal Aortic Aneurysms		
Role: Co-investigator (Filardo G, PI)		
National Trauma Institute	\$243,622	11/1/10 - 10/31/11
Comparative Effectiveness of Clinical Care Processes in Resuscitation and Management of Moderate to Severe Traumatic Injuries		
Role: Co-investigator (Shafi S, PI)		
Seeger Foundation	\$53,000	4/11/10 - 7/31/10
Comparative Effectiveness of Clinical Care Processes in Resuscitation and Management of Moderate to Severe Traumatic Injuries		
Role: Co-investigator (Shafi S, PI)		
AHRQ (R03 HS018220-01)	\$99,955	10/01/09 - 9/30/11
Impact of Health IT on Primary Care Work-flow and Financial Measures		
Role: Co-investigator (Fleming N, PI)		
AHRQ (1R01HS017718-01A1)	\$887,489	9/30/09 - 7/31/12

From NSQIP to TQIP - Trauma Quality Improvement Project

Role: Co-investigator (Shafi S, PI)

American Diabetes Association	\$580,000	2/01/09 - 1/31/12
Impact of an Ambulatory Electronic Health Record on Quality of Diabetes Care in a Primary Care Setting		
Role: PI		
AHRQ DEcIDE	\$19,980	10/01/08 - 9/30/09
Research Methods for Clinical Effectiveness Studies: Symposium and Journal Supplement Part II		
Role: BHCS PI		
AHRQ (1R18 HS017908-01)	\$867,219	9/30/08 - 9/29/11
Improving the Safety of Primary Care by Measuring Adverse Events and Improvement		
Role: Co-investigator (Kennerly D, PI)		
AHRQ DEcIDE Project 27-EHC	\$176,115	9/01/08 - 4/01/10
Comparative Effectiveness of Oral Hypoglycemics for Reducing Diabetic Nephropathy		
Role: Consultant		
AHRQ DEcIDE Project 28-EHC	\$56,971	7/28/08 - 10/28/09
Computer-based Clinical Decision Support (CDS) Tools for Gene-based Tests used in Breast Cancer		
Role: BHCS PI		
AHRQ (1P20HS017134-01)	\$199,986	9/01/07 - 12/31/09
Adverse Event Directed Analysis in Ambulatory Primary Care		
Role: Co-investigator		
International Diabetes Foundation	\$65,000	1/15/07 - 6/15/09
Motivational Interviewing to Maximize Utilization and Effectiveness of Self-Management Education for Adults with Type 2 Diabetes		
Role: PI (with Robert Mayberry, Ph.D.)		
AHRQ DEcIDE RFTO Project 9815, Task No. 5		9/01/07 - 2/08/09
Advancing Research Methodology for Measuring and Monitoring Patient-Centered Communication in Cancer Care		
Role: BHCS PI		
Commonwealth of Pennsylvania	\$400,000	9/01/06 - 8/30/07
Improving the Quality of Hospital Care in Pennsylvania: A Demonstration Project		
Role: PI		
NHLBI (1 U01 HL077887-01)		2005 - 2009
Post Resuscitative and Initial Utility in Life Saving Efforts (PULSE)		
Role: Advisory Board Member (PI - Ahamed Idris, UTSWSOM)		
AHRQ (HSA290200500361) Variable/Task Order Specific		9/16/05 - 9/30/10
Developing Evidence to Inform Decisions about Effectiveness (DEcIDE Network)		
Role: BHCS PI (RTI Prime Contractor)		
Pfizer	\$24,750	3/14/05
ISQua-AMIA Health Care Quality Improvement and Informatics Conference Grant		

Harvard School of Public Health

Role: PI

AHRQ (1UC1HS015431-01) \$1,500,000 9/30/04 - 9/29/07

Rural Hospital Collaborative for Excellence Using IT

Role: PI (with Josie R Williams, Texas A&M)

AHRQ (HS-04010) Variable/Task Order Specific 7/01/04 - 9/30/10

Integrated Delivery System Research Network/ Accelerating Change and Transformation in Organizations and Networks (ACTION)

Role: BHCS PI (RTI Prime Contractor)

AHRQ (1 R13 HS014501-01) \$36,752 10/23/03 - 10/22/04

Performance Measurements to Improve Quality of Care

Role: PI

Pfizer \$185,000 1/01/02 - 6/30/02

A Randomized Trial of Strategies to Improve Diabetes Care: Effectiveness and Costs of Physician Profiling and Care Coordination by a Diabetes Resource Nurse: Funding to Extend Intervention from 12 months to 18 months

Role: PI

AHRQ (1 R13 HS10970-01) \$50,000 9/30/01 - 9/29/02

Buenos Aires Indicators Summit

Role: Conference Committee Planning Chair

American Diabetes Association \$100,000 8/01/00 - 3/31/02

A Randomized Trial of Strategies to Improve Diabetes Care: Effectiveness and Costs of Physician Profiling and Care Coordination by a Diabetes Resource Nurse: Supplement to Support Cost-Effectiveness Analysis Component

Role: PI

AHRQ/UAB/ \$5,000 8/01/00 - 3/31/02

Alabama Quality Assurance Foundation

A Randomized Trial of Strategies to Improve Diabetes Care: Effectiveness and Costs of Physician Profiling and Care Coordination by a Diabetes Resource Nurse: Subcontract to Evaluate the Achievable Benchmarks of Care Profiling Methodology

Role: PI

American Diabetes Association \$750,000 8/01/00 - 3/31/02

A Randomized Trial of Strategies to Improve Diabetes Care: Effectiveness and Costs of Physician Profiling and Care Coordination by a Diabetes Resource Nurse

Role: PI

Pfizer \$117,792 8/01/99 - 7/31/00

Pfizer Health Services Research Fellowship

Role: PI

NIH (1 KO1 HL04039-01) \$524,960 7/01/99 - 6/30/04

NHLBI Mentored Research Scientist Award for Minority Faculty

Role: Co-Mentor		
Hartford SECGM CHF Management in Hospitalized Elderly Patients Role: Co-Mentor	\$50,000	7/01/99 - 6/30/01
Aetna/USQA A Demonstration Project to Evaluate the Effect of an Administrative Decision Support System on Cost and Quality of In-Hospital Surgical Care Role: PI	\$359,978	1/01/99 - 12/31/00
Hoechst Marion Roussel Evaluating the Costs of Treatment Failure in Community-Acquired Pneumonia Role: Clinical Epidemiologist	\$149,456	1/01/99 - 12/31/99
Medical College of Georgia Systematic Review of Physician Response to Incentives Role: Clinical Epidemiologist	\$45,791	10/01/98 - 3/31/99
AHCPR (RO1 HS09722-01A1) Improving Primary Care of African-Americans with NIDDM Role: Clinical Epidemiologist	\$619,635 ( <i>1<sup>st</sup> year</i> )	9/30/98 - 9/29/02
MEDSTAT Development and Implementation of AHCPR Evidence-based Practice Center (EPC) Program Evaluation Role: PI - KLWI Subcontract	\$12,370 (\$250,000)	9/30/98 - 2/28/00
Hartford Foundation Southeast Center for Excellence in Geriatric Medicine Role: Steering Committee/Research Mentor	\$825,000	7/01/98 - 6/30/03
Novartis A Pharmaceutical Outcomes Study & Cost Analysis of the Management of Patients with Hypertension Role: Co-PI/Epidemiologist	\$587,905	10/1/97 - 12/31/98
NIH (R25DE12673-01) A Population-based Approach to Health Care Research and Practice Role: Faculty member	\$107,570	10/1/97 - 9/30/98
KLWI/MCG Medical College of Georgia, Center for HealthCare Improvement, Initiation of Health Services Research Certificate Program Role: Faculty	\$44,000	9/01/97 - 8/31/00
Glaxo-Wellcome Community-Acquired Pneumonia Study Project Phase II (b): A Prospective Observational Cohort Study Role: Co-PI/Epidemiologist	\$249,415	8/01/97 - 3/31/98
Atlanta VAMC Proposal Consultation Project Role: Consultant	\$10,000	7/01/97 - 10/31/97

Merck & Co Inc. Detection and Management of Osteoporosis in Primary and Obstetric/Gynecologic Settings Role: Epidemiologist	\$25,000	4/01/97 - 3/31/98
American Cancer Society Inc. Conference Grant: Informing Oncologic Services Purchasing Decisions Role: Co-PI	\$90,820	1/01/97 - 10/31/97
Baxter Biotech International Study of Peri-Operative Transfusions (ISPOT) Role: Epidemiologist	\$25,000	1/01/97 - 9/30/97
Merck & Co Inc. Econometric Model: Indirect Costs Associated with Ischemic Heart Disease Role: Clinical Epidemiologist	\$129,953	1/01/97 - 6/30/97
Qualidigm Fifth Scope of Work Cooperative Project Consultation Role: Clinical Epidemiologist	\$94,575	10/01/96 - 9/30/99
Oklahoma Foundation for Medical Quality Fifth Scope of Work Cooperative Project Consultation Role: Clinical Epidemiologist	\$94,575	10/01/96 - 9/30/99
Virginia Health Quality Center Fifth Scope of Work Cooperative Project Consultation Role: Clinical Epidemiologist	\$94,575	10/01/96 - 9/30/98
SmithKline Beecham SmithKline Beecham Health Services Research Fellowship Role: PI/Mentor	\$302,500	9/01/96 - 8/31/99
Atlanta VA Atlanta VA Medical Center/EUCCES Scarce Medical Resources Contract Role: Center Director	\$669,000	9/01/96 - 8/31/98
Merck & Co Inc. Congestive Heart Failure Quality Management Randomized Trial Role: Clinical Epidemiologist	\$249,970	9/01/96 - 12/31/97
Astra Merck Practice Behavior Change Strategies: Medicare Beneficiaries with Peptic Ulcer Disease Role: Epidemiologist	\$50,000	9/01/96 - 8/31/97
Georgia Medical Care Foundation Fifth Scope of Work Cooperative Project Consultation Role: Clinical Epidemiologist	\$94,575	7/01/96 - 6/30/99

Roche Laboratories Community-Acquired Pneumonia Study Project Phase II: A Prospective Observational Cohort Study Role: Co-PI/Epidemiologist	\$572,391	6/01/96 - 6/01/97
Colorado Foundation for Medical Care Fifth Scope of Work Cooperative Project Consultation Role: Clinical Epidemiologist	\$94,575	4/01/96 - 3/31/99
Roche Laboratories Community-Acquired Pneumonia Study Project: Phase I and Design of Phase II Role: Co-Investigator	\$139,432	11/01/95 - 2/29/96
Georgia Health Policy Center White Paper: The State of the Science in Determining the Impact of Managed Care Arrangements on Quality of Care Role: Co-PI	\$18,586	11/01/95 - 1/31/96
National Imaging Affiliates Inc. Quality Management Consultation Role: PI	\$5,046	8/01/95 - 8/31/95
DuPont Merck Improving the Anticoagulant Management of Venous Thromboembolism: A Randomized Trial of Dissemination Strategies Role: Clinical Epidemiologist	\$121,000	6/01/95 - 12/31/97
Ethicon Endo-Surgery Inc. Pilot Randomized Trial of Laparoscopic Surgery vs. Omeprazole for the Management of Gastroesophageal Reflux Disease Role: PI	\$182,348	1/01/95 - 12/31/96
Oklahoma Foundation for Medical Quality Fourth Scope of Work Focused Project Consultation Role: PI	\$21,000	1/01/95 - 9/30/96
Emory University System of Health Care Development of Emory University Center for Clinical Evaluation Sciences Role: PI/Center Director	<i>Variable</i> \$3,868,131	5/01/94 - 4/30/99
Connecticut Peer Review Organization Fourth Scope of Work Focused Project Consultation Role: PI	\$72,000	10/01/93 - 9/30/96
Virginia Health Quality Center Fourth Scope of Work Focused Project Consultation Role: PI	\$197,892	10/01/93 - 9/30/96
Oklahoma Foundation for Medical Quality Special Scope of Work Focused Project Consultation	\$140,000	10/01/93 -12/31/94

Role: PI		
Fourth Scope of Work Cooperative Project Consultation Georgia Medical Care Foundation Role: PI	\$179,000	7/01/93 - 6/30/96
Commonwealth of VA & Blue Cross/Blue Shield of VA Key Advantage Program Evaluation Role: Co-Investigator (PI - Lou Rossiter, MCV) University of Virginia Institutional Academic Research Award Role: PI	\$19,455	7/01/93 - 6/30/96
	\$30,250	7/01/93 - 6/30/94
AMA/Acad Med Ctr Consortium Development of Aortic Aneurysm Surgery Practice Parameter Role: PI	\$12,500	7/01/93 - 2/28/94
Colorado Foundation for Medical Care Fourth Scope of Work Cooperative Project Consultation Role: PI	\$65,691	4/01/93 - 3/31/96
MSVRO/HCFA MSVRO/Extension Scope of Work Role: PI	\$39,309	4/01/93 - 9/30/93
CONN PRO/HCFA CONN PRO/Extension Scope of Work Role: PI	\$24,000	4/01/93 - 9/30/93
CA-91-33 UNC Breast Cancer SPORE Grant Role: Consultant (PI - Barbara Hulka)	\$209,918	10/01/92 - 9/30/95
PRO-Oklahoma Medicare Quality of Care Research Program Role: PI	\$40,000	10/01/92 - 9/30/93
PRO-Georgia Medicare Quality of Care Research Program Role: PI	\$40,000	10/01/92 - 6/30/93
OMPRO/HCFA OMPRO/Extension Scope of Work Role: PI	\$8,150	10/01/92 - 3/31/93
Commonwealth Clinical Systems PRO/Medicare Information Systems Research Project Role: PI	\$29,740	8/01/92 - 12/31/93

PRO-New Hampshire Medicare Quality of Care Research Program Role: PI	\$28,000	6/01/92 - 7/31/93
HCFA/CONN PRO Methodologic Direction for Hospital Mortality Analysis Project Role: PI	\$32,570	4/27/92 - 2/26/93
Commonwealth Clinical Systems Evaluation of the Commonwealth Health Alliance Role: PI	\$43,356	11/01/91- 12/31/92
AHCPR Practice Guideline Clinical Review Forum Role: Consultant	\$203,000	10/01/91 - 9/30/92
Stroke Prevention PORT (PI - David Matchar) (Patient Outcome Research Team) Role: Co-Investigator/PI Epid Core Mayo Subcont	\$5,672,836	9/30/91 - 7/31/96
Stroke Prevention PORT/AHCPR Stroke Patient Outcomes Research Team (PORT) Medicare Claims Analyses Center for Health Economics Research Role: PI	\$20,000	9/30/91 - 7/30/96
UVA Med School Dean General Research Support Role: PI	\$150,000	8/01/91 - 6/30/94
UVA V-P Health Sciences UVA Health Services Research Capability Development Role: PI	\$258,369	8/01/91 - 6/30/94
PRO-CT, VA, CO, OR Medicare Quality of Care Research Program Role: PI	\$204,000	8/01/91 - 2/31/92
NS 06663F Mayo Cerebrovascular Clinical Research Center Role: Co-Inv, PI Epid Core (PI - JP Whisnant)	\$1,964,525	3/01/91 - 7/29/91
NIH AG 0888729-01A1 Trends in Elderly Mortality, Morbidity and Hospital Use Role: Co-Investigator (FIRST AWARD-Cynthia Leibson)	\$349,944	9/30/90 - 7/31/95
MERCK/SER Clinical Epidemiology Scholar Career Development Award Application of Clinical Epidemiology to Development of Medical Practice Guidelines Role: PI	\$190,000	7/01/90 - 6/30/93

Mayo Supported Research Referral Selection Bias in Medicare Hospital Mortality Pattern Analysis Role: PI	\$23,906	5/01/90 - 4/30/91
RAND/AMCC/AMA/PEW/Hartford Abdominal Aortic Aneurysm Surgery Guideline Development Role: PI	\$554,118	4/01/90 - 3/30/93
AG 06786 Alzheimer's disease Patient Registry Role: Co-Investigator (PI - LT Kurland)	\$1,692,950	1/01/90 - 11/01/90
Merck Epidemiologic Features of Heart Failure Role: PI	\$20,000	7/01/89 - 6/30/90
Cleveland Health Action Council Medical Care Utilization Benchmark Analysis Role: PI	\$15,000	6/01/89 - 1/01/90
CA 46332 Breast Cancer Risk Assessment in Benign Breast Disease Role: Co-PI (w/LE Wold)	\$515,631	10/01/87 - 8/30/90
AR 30582 Rochester Epidemiology Program Project Role: Co-Investigator (PI - LJ Melton)	\$1,642,022	7/01/86 - 7/29/91
Diabetes Research and Education Foundation The National History of Renal Disease in Non-Insulin Dependent Diabetes Mellitus Role: PI	\$15,465	1/01/86 - 12/31/86
HL 24326 CHD Incidence, Mortality, Risk Factor Relationships Role: PI	\$647,854	12/01/85 - 11/30/90
Juvenile Diabetes Foundation International Diabetes Mellitus: Referral Bias in Survival Analysis and Risk Factor Estimation Role: PI	\$45,500	7/01/85 - 6/30/87
HS 05328 (National Center for Health Services Research Doctoral Dissertation Award) Referral Bias: Survival and Prognostic Factors in NIDDM Role: PI	\$20,000	5/01/85 - 1/01/88
Mayo Supported Research Referral Bias: Prognostic Factors for Survival in Type II Diabetes Mellitus Role: PI	\$19,982	1/01/85 - 12/31/85

Holderness Medical Fellowship Program The Process of Medical Care and Blood Pressure Control Role: PI	\$3,000	6/01/82 - 5/31/83
North Carolina Fellows Program The Role of Domiciliary Visiting in British General Practice Role: PI	\$500	1/01/77 - 4/30/77

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32. **Ballard DJ.** Applying appropriateness methods to address overuse while ensuring the delivery of appropriate care: the example of cardiac revascularization. *Prescriptions for Excellence in Healthcare.* 2010 Spring;1(8):8-10.
33. **Ballard DJ,** Filardo G, da Graca B, Powell JT. Clinical practice change requires more than comparative effectiveness evidence: abdominal aortic aneurysm management in the USA. *J Compar Effect Res.* 2012;1:31-44.
34. **Ballard DJ.** The potential of Medicare accountable care organizations to transform the American health care marketplace: rhetoric and reality. *Mayo Clin Proc.* 2012;87:707-709.
35. Masica AL, Collinsworth AW, Priest EL, Filardo G, Stauffer BD, Smith SH, Leveille MH, Houston S, Fleming NS, **Ballard DJ.** Health Services Research as Operational Infrastructure within an

Integrated Care Delivery System: A Case Study from Baylor Scott & White Health. *Clinical Researcher*. February 2015.

36. **Ballard DJ**, Fleming NS. Rising health care charges: A red herring in a value-based health care world? *Mayo Clin Proc*. 2019;94(6):946-948.
37. **Ballard DJ**, Nash DB. The Best Interest of the patient. *Am J Med Qual*. 2020; Sept/Oct; 35 (5):372-373.
38. Nichols LM, **Ballard DJ**. Leveraging Community Information to Improve Health Equity. *Mayo Clin Proc*. 2022 Jan;97(1):10-11.

### **Selected Invited Lectures/Presentations**

1. “The Rochester Coronary Heart Disease Project,” School of Public Health, University of Minnesota, January 21, 1987.
2. “History of and Recent Progress in Clinical Epidemiology at Mayo Clinic,” Institute of Hygiene, University of Milan, Italy, July 16, 1987.
3. “The Rochester Epidemiology Program Project Medical Records Linkage System: Design and Applications for Population-Based Epidemiologic Research,” Mario Negri Institute, Milan, Italy, July 17, 1987.
4. “The Epidemiology of Chronic Renal Failure in Diabetes Mellitus: A Population-Based Study in Rochester, Minnesota, 1945-79,” Endocrine Grand Rounds, Mayo Clinic, Rochester, MN, November 11, 1987.
5. “Cardiovascular Epidemiology and the Rochester Epidemiology Program Project: Historical Overview and Current Research,” School of Public Health, University of Minnesota, March 3, 1988.
6. “Cardiovascular Health Care Technology Assessment: Cost-Effectiveness in the Diagnosis and Management of Abdominal Aortic Aneurysms,” Center for Health Services Research, University of Minnesota, May 6, 1988.
7. “Referral Bias in Clinical Prognostic Studies: When Can You Believe the Results of Referral Practice-Based Research?” Neurology Department 75th Anniversary Program, Mayo Clinic, Rochester, MN, September 23, 1988.
8. “Prognosis Associated with Small Abdominal Aortic Aneurysms (AAA): Implications for Elective AAA Resection,” Institute of Cardiac and Vascular Surgery, Policlinico Umberto I, University of Rome, Italy, December 19, 1988.
9. “The Rochester Epidemiology Project: Applications to the Epidemiology of Diabetes Mellitus,” Institute of Hygiene, University of Turin, Italy, January 11, 1989.
10. “The Rochester Epidemiology Project: A Data Resource for Cardiovascular Epidemiology Research,” School of Public Health, University of Minnesota, February 8, 1989.

11. "The Rochester Epidemiology Project: A Data Resource for Pharmacoepidemiologic Research," School of Public Health, University of North Carolina, February 16, 1989.
12. "The Mayo Clinic Rochester Epidemiology Project as a Data Resource for Pharmacoepidemiology and Health Services Research," Clinical Epidemiology Course for the Pharmaceutical Industry, School of Public Health, University of North Carolina, July 13, 1989.
13. "The Status of Appropriateness of Medical Care Research in the United States," University of Padova, Padova, Italy, February 1, 1990.
14. "Referral Bias in Clinical Research," Department of Clinical Epidemiology, National Research Council, Milan, Italy, February 7, 1990.
15. "Prognosi delgi Aneurismi dellá Aorta Addominale," Societá Lombarda di Chirurgia, Clinica Chirurgica Generale dellá Universita, Milan, Italy, February 8, 1990.
16. "Epidemiology of Abdominal Aortic Aneurysms: Contributions from the Rochester Epidemiology Project," School of Public Health, University of Minnesota, March 7, 1990.
17. "The Rochester Epidemiology Project: A Data Resource for Pharmacoepidemiologic Research," School of Public Health, University of North Carolina, March 9, 1990.
18. "Health Services Research Activities at Mayo Clinic: Interfaces with the RAND/Academic Medical Center Consortium," Henry Ford Hospital, Detroit MI, June 22, 1990.
19. "The Mayo Clinic Rochester Epidemiology Project as a Data Resource for Pharmacoepidemiology and Health Services Research," Clinical Epidemiology Course for the Pharmaceutical Industry, School of Public Health, University of North Carolina, July 20, 1990.
20. "Epidemiology of Renal Failure in Non-Insulin Dependent Diabetes Mellitus," Minnesota Department of Health, July 25, 1990.
21. "The Increasing Importance in the United States of Research Concerned with Medical Care Efficacy, Effectiveness, and Appropriateness: Carotid Endarterectomy and Abdominal Aortic Aneurysm Resection as Case Studies," Unitá Sanitaria Locale No. 7, Regione Sardegna, Nuoro, Italy, September 6, 1990.
22. "The RAND/Academic Medical Center Consortium Clinical Appropriateness Initiative: Assessment of the Effectiveness of Abdominal Aortic Aneurysm Surgery," Division of General and Preventive Medicine, Department of Medicine, University of Alabama at Birmingham School of Medicine, January 10, 1991.
23. "The RAND/Academic Medical Center Consortium Clinical Appropriateness Initiative: Assessment of the Effectiveness of Abdominal Aortic Aneurysm Surgery," Institut Universitaire de Médecin Sociale et Préventive, Lausanne, Switzerland, January 29, 1991.
24. "The RAND/Academic Medical Center Consortium Clinical Appropriateness Initiative: Assessment of the Effectiveness of Abdominal Aortic Aneurysm Surgery," Mario Negri Institute, Milan, Italy, January 31, 1991.

25. "The Contribution of Epidemiology to Assessment of the Effectiveness of Elective Abdominal Aortic Aneurysm Surgery," School of Public Health, University of Minnesota, February 27, 1991.
26. "An Overview of Medical Care Effectiveness Research in the United States," Latina Medical Society, Latina, Italy, March 5, 1991.
27. "Appropriateness and Outcomes Research in the United States," Istituto Superiore di Sanita, Rome, Italy, March 6, 1991.
28. "Strategies in Clinical Research: Assessment of Therapeutic Effectiveness," University of Chieti, Chieti, Italy, March 8, 1991.
29. "An Overview of Medical Care Effectiveness Research in the United States," Ospedale Consorziale Treviglio-Caravaggio, Treviglio, Italy, March 14, 1991.
30. "Medical Care Referral Selection Bias in Prognostic Assessment: Implications for Outcomes Research and Practice Guideline Development," Second Annual Meeting, Merck/Society for Epidemiologic Research Clinical Epidemiology Fellowship Advisory Board, Woodbridge NJ, May 16, 1991.
31. "Impact of Medical Care Referral Selection Bias on Formulation of Health Care Policy," Olmsted Community Hospital, Rochester MN, June 13, 1991.
32. "Health Services Research Opportunities and Challenges for Professional Review Organizations," Annual Meeting, Medical Society of Virginia Review Organization, Arlington VA, September 22, 1991.
33. "Medical Care Referral Selection Bias in Prognostic Assessment: Implications for Medicare Pattern Analysis by Peer Review Organizations," American Medical Peer Review Association, 1992 Data, Finance and Medical Review Conference, Baltimore MD, January 24, 1992.
34. "Linkage of Practice Guidelines and Outcomes Research: Implications for Outcomes-Based Health Care Delivery Management," Scientific Applications International Corporation/Department of Defense Quality of Care Conference, Falls Church VA, April 27, 1992.
35. "Medical Care Referral Selection Bias in Prognostic Assessment: Implications for Outcomes Research and Practice Guideline Development," Sheps Center for Health Sciences Research, University of North Carolina at Chapel Hill, May 22, 1992.
36. "Scientific Challenges for PROs in HCFA's Health Care Quality Improvement Initiative," American Medical Peer Review Association Annual Meeting, San Francisco CA, September 15, 1992.
37. "The Role of Health Evaluation Sciences in the Mission of the Academic Health Sciences Center," Association Campus Bio-Medico, Rome, Italy, October 2, 1992.
38. "The Clinical Appropriateness Initiative: A Collaborative Study of the Academic Medical Center Consortium, RAND, and the AMA," The Flemish Institute for Total Quality Management in Health Care, Virginia Health Policy Research Center, Charlottesville VA, October 6, 1992.

39. "Efficacia Clinica ed Appropriatelyzza della Utilizzazione della Risonanza Magnetica," Associazione Comuni Bassa Bergamasca Unita Socio Sanitaria Locale 32, Ospedale Consorziiale Treviglio-Caravaggio, Treviglio, Italy, October 22, 1992.
40. "Lo Sviluppo di Linee Guida: L'esperienza del Programma Americano sull'Appropriatelyzza Clinica e le Sue Implicazioni per i Sistemi Sanitari Europei," 5th Congresso Nazionale della Societa Italiana di Verifica e Revisione di Qualita Corso di Formazione sulla Valutazione di Efficacia nei Servizi Sanitari Qualita e Efficacia, Padova, Italy, October 23, 1992.
41. "The Stroke Prevention Patient Outcome Research Team," Update on Outcomes and Effectiveness Research Session, American Medical Review Center's Seventh Annual Research Symposium, Washington, DC, November 17, 1992.
42. "Selection in Medical Care Referral: Implications for Outcomes Research, Practice Guideline Development and Health Care Policy," School of Public Health, Emory University, Atlanta GA, December 4, 1992.
43. "The Role of Population-Based Epidemiologic Surveillance in Clinical Practice Guideline Development," Agency for Health Care Policy and Research Office of the Forum for Quality and Effectiveness in Health Care Methodology Conference, Durham, NC, December 13-16, 1992.
44. "Methods for Evaluation of Health Care Effectiveness: Elective Abdominal Aortic Aneurysm Surgery as a Case Study," Cardiology Grand Rounds, University of Virginia School of Medicine, January 5, 1993.
45. "Methods for Evaluation of Health Care Effectiveness: Elective Abdominal Aortic Aneurysm Surgery as a Case Study," Department of Epidemiology and Public Health, University of Newcastle Upon Tyne, January 20, 1993.
46. "Practice Guidelines: State of the Art in the U.S.," Keynote Address, Regional Conference on Guidelines and Protocols, Northern Regional Health Authority, Newcastle Upon Tyne, January 21, 1993.
47. "Methods for Evaluation of Health Care Effectiveness: Elective Abdominal Aortic Aneurysm Surgery as a Case Study," Session on Medical Outcomes and Effectiveness, Ninth Annual Meeting of the International Society of Technology Assessment in Health Care, Sorrento, Italy, May 25, 1993.
48. "Selection in Referral for Medical Care: Implications for Outcomes Research, Practice Guideline Development and Quality of Care Assessment," University of Virginia Health Policy Research Center, July 23, 1993.
49. "Selection in Referral for Medical Care: Implications for Outcomes Research, Practice Guideline Development and Quality of Care Assessment," Department of Public Health Sciences, Bowman Gray Medical Center, Winston-Salem NC, August 9, 1993.
50. "Evaluation of the Appropriateness and Necessity of Medical Care in the Italian Academic Medical Center: Insights from the American Medical Association/Academic Medical Centers Consortium/RAND Corporation Clinical Appropriateness Initiative in the United States," Campus Bio-Medico, Rome, Italy, October 14, 1993.

51. "Multicenter Studies of Appropriateness: Lessons Learned," Conference on Appropriateness of Medical Care in Europe, Lausanne, Switzerland, November 1, 1993.
52. "Selection in Referral for Medical Care: Implications for Outcomes Research, Practice Guideline Development and Quality of Care Assessment," Health Services Research Lunch Club, Williamson Institute, Medical College of Virginia, Richmond VA, April 11, 1994.
53. "Selection in Referral for Medical Care: Implications for Outcomes Research, Practice Guideline Development and Quality of Care Assessment," Merck Research Laboratories, Blue Bell PA, April 14, 1994.
54. "Selection in Medical Care Referral: Implications for Outcomes Studies, Clinical Practice Guideline Development, and Quality of Care Assessment," 30th Annual Meeting, Drug Information Association. Healthcare Systems in Transition: A Challenge for Innovation, Washington DC, June 6, 1994.
55. "Health Services Research—What Is It and How Do You Build It?" Association of American Medical Colleges Joint Fall Meeting of the Southern, Midwest, and Great Plains Medical School Deans, Atlanta GA, October 8, 1994.
56. "Profiling of Hospitals with Respect to Quality of Care, Outcomes and Cost: How to Develop the Capability and Apply It," Georgia Hospital Association, Conference on Succeeding in the Managed Care Environment: Information Requirements for Measuring Outcomes, Cost & Quality, Norcross GA, October 14, 1994.
57. "Outcomes Research: A Practical Primer," Department of Family Medicine, Emory University School of Medicine, Atlanta GA, September 8, 1995.
58. "The Kerr L White Institute for Health Services Research," Clinical Enterprise Council, Medical College of Georgia, Augusta GA, September 29, 1995.
59. "Outcomes Research and the Emory University Center for Clinical Evaluation Sciences," Department of Neurosurgery, The Emory Clinic, Atlanta GA, October 11, 1995.
60. "Kerr L White Institute for Health Services Research: Collaborative Multiorganizational Health Care Improvement Initiatives," Emory University System of Health Care Affiliate Network Meeting, Atlanta GA, December 1, 1995.
61. "The Emory University Center for Clinical Evaluation Sciences and Outcomes Research," Division of General Internal Medicine, Emory University School of Medicine, Atlanta GA, January 11, 1996.
62. "Outcomes Research and the Emory University Center for Clinical Evaluation Sciences," Department of Rehabilitation Medicine, Emory University School of Medicine, Atlanta GA, March 12, 1996.
63. "Health Services Research to Measure Added Value," 49th Annual Cancer Symposium of the Society for Surgical Oncology, Atlanta GA, March 31, 1996.
64. "The Role of Population-Based Research Designs in Effectiveness Assessment," Center for Pharmaceutical Outcomes Research, University of North Carolina at Chapel Hill, April 1, 1996.

65. "A Physician's Guide to Methods for Evaluation of Health Care Effectiveness: Elective Abdominal Aortic Aneurysm Surgery as a Case Study," Quality Outcomes and Ethics Conference, Mayo Clinic, Jacksonville FL, April 4, 1996.
66. "The Role of Population-Based Research Designs in Effectiveness Assessment," Medical Outcomes Research Conference, Baltimore MD, June 3, 1996.
67. "Collaborazione tra Emory University e Libero Istituto Universitario 'Campus Bio-Medico: Health Services Research e Training per Medici ed Infermieri," Scientific Advisory Committee of the Campus Bio-Medico, Rome, Italy, October 22, 1996.
68. "Approaches to the Analysis of Reliability Within and Between Expert Panel Results," Workshop on Analyzing Data from Expert Panels, Mario Negri Institute, Milan, Italy, February 14, 1997.
69. "Comparison of RAND Global Subjective Judgment Methods with Probability Methods Assessment of Appropriateness and Necessity," Workshop on Analyzing Data from Expert Panels, Mario Negri Institute, Milan, Italy, February 14, 1997.
70. "The Role of Population-Based Research Designs in Assessment of Clinical Effectiveness," Emory Affiliate Research Network, Atlanta GA, March 19, 1997.
71. "Evaluating the Value of External Quality Oversight in Health Care: An American Case Study," University of Milan, Milan, Italy, May 24, 1997.
72. "Applying Health Care Technology Assessment in Everyday Clinical Practice: The Case of Elective Abdominal Aortic Aneurysm Surgery," 13th Annual Meeting of International Society for Technology Assessment in Health Care, Barcelona, Spain, May 26, 1997.
73. "The Role of Outcomes Research in Health Care Technology Assessment: The Role of Population-Based Research Designs," 13th Annual Meeting of International Society for Technology Assessment in Health Care, Barcelona, Spain, May 27, 1997.
74. "The Place of Outcomes Research in Assessment of Clinical Effectiveness," Merck Physician Advisory Group Conference, Atlanta GA, June 28, 1997.
75. "The Value of Outcomes Research in Surgical Practice," Surgical Grand Rounds, Emory University Hospital, December 18, 1997.
76. "Evaluating the Effectiveness of Health Care Quality Improvement Interventions," Seminar Series in Outcomes Management and Research, University of Kansas Medical Center, Kansas City KS, February 18, 1998.
77. "A Population-based Approach to Health Care Research and Practice: An Educational Workshop," Emory University, Atlanta GA, May 11-15, 1998.
78. "Evaluating the Effectiveness of Health Care Quality Improvement Interventions," 34th Annual Meeting of the Drug Information Association, Boston MA, June 10, 1998.
79. "Multi-organizational Health Services Research: Lessons Learned from Two Decades of Experience," AHCPR/Commonwealth Fund/Blue Cross/Blue Shield Health Services Research Conference, Washington DC, February 2, 1999.

80. "Methods for Evaluation of Health Care Effectiveness: Abdominal Aortic Aneurysm Management as a Case Study," Catalan Agency for Health Technology Assessment, Barcelona, Spain, July 7, 1999.
81. "Improving Quality of Care in Geriatric Populations," Baylor Geriatrics Conference, Baylor University Medical Center, Dallas TX, January 25, 2000.
82. "Aligning Physicians and Hospitals to Improve Health Care Quality: A Report to the 25th World Congress of Internal Medicine from an Integrated Community-Based Health Care System in the United States," Cancun, Mexico, June 6, 2000.
83. "Sviluppare la Clinical Governance nel Sistema Sanitario," Health Authority of Pordenone, Pordenone, Italy, December 21, 2000.
84. "Aligning Physicians and Hospitals to Improve Health Care Quality," CIMA Hospital, San Jose, Costa Rica, April 16, 2001.
85. "The Role of Quality of Care Indicators in Conceptualizing and Implementing a Strategic Plan to Improve Clinical Quality Across an Integrated Health Care System," Third Annual Quality of Care Indicators Summit, International Society for Quality in Health Care, Buenos Aires, Argentina, October 2, 2001.
86. "Aligning Measurement and Improvement of Clinical Quality Across Multiple Hospitals of a Regional Health Care System with National Directions in Health Care Improvement: An Example from the United States of America," Annual Meeting of the Mexican Society for Quality in Health Care, Mexico City, Mexico, May 24, 2002.
87. "Alignment of a Regional Network of Hospitals with National Directions in Health Care Improvement in the United States," L' Ospedale Santa Chiara, Azienda Provinciale per i Servizi Sanitari, Trento, Italy, October 10, 2002.
88. "Technology Assessment and the Implementation of Evidence-Based Health Care: Alignment of a Regional Health Care System with National Directions in Health Care Improvement in the United States," Workshop on Health Care Technology Assessment, Castel Ivano, Trento, Italy, October 12, 2002.
89. "Alignment of a Regional Network of Hospitals with National Directions in Health Care Improvement in the United States," Keynote Address, Quality Improvement Forum 2002, Calgary Health Region, Calgary, Alberta, December 6, 2002.
90. "Improving Primary Care through Interventions Linked to Evidence-based Clinical Quality Indicators: Experience of the Health Texas Provider Network, Baylor Health Care System," Workshop Session, Quality Improvement Forum 2002, Calgary Health Region, Calgary, Alberta, December 6, 2002.
91. "Using Clinical Quality Indicators in Health Care Improvement: Perspectives from the International Society for Quality in Health Care and Health Care Delivery Systems in the United States," 2003 Italian National Public Administration Forum, Health Care Section, Quality Indicators Session, Rome, May 8, 2003.

92. "Designing and implementing quality improvement tools in health care delivery organizations: Methods and experiences from the Baylor Health Care System," Keynote plenary session address at the Annual International Congress of the Mexican Society for Quality in Health Care, Mexico City, Mexico, November 24, 2003.
93. "Designing and implementing quality improvement tools in health care delivery organizations: Methods and experiences from the Baylor Health Care System," Azienda Unita Sanitaria Locale, Reggio Emilia, Italy, May 10, 2004.
94. "Designing and implementing quality improvement tools in health care delivery organizations: Methods and experiences from the Baylor Health Care System," Testimony for the Healthcare Excellence and Accountability Response Team, Commonwealth of Pennsylvania, Harrisburg PA, August 26, 2004.
95. "Connected Communities/Regional Health Information Organizations and Health Care Improvement Opportunities: Perspectives from the Baylor Health Care System," Texas Healthcare Task Force, Dallas, Texas, February 21, 2005.
96. "Designing and implementing quality improvement tools in health care delivery organizations: Methods and experiences from the Baylor Health Care System," Azienda ULSS17, Regione del Veneto, Lozza Atestino, Italy, June 6, 2005.
97. "Designing and implementing quality improvement tools in health care delivery organizations: Methods and experiences from the Baylor Health Care System," Keynote Address for the Session on Clinical Governance, Fondazione CUOA, Altavilla Vicentina, Italy, June 6, 2005.
98. "Quality of Care Research, Baylor Health Care System," Presentation for the Select Committee on Patient Safety, Texas Medical Association, Austin TX, September 17, 2005.
99. "Saving 100,000 Lives and Beyond: The Baylor Health Care System Journey in Reducing Preventable In-Hospital Mortality," Centre for Public Policy and Management, Manchester Business School, University of Manchester, Manchester, England, October 26, 2006.
100. "Ambulatory Electronic Health Record Deployment Lessons Learned and Evaluation Plan: The Experience of the Baylor Health Care System," Northwest Institute for Bio-Health Informatics, University of Manchester, Manchester, England, October 27, 2006.
101. "Saving 100,000 Lives, Protecting 5 Million Lives from Harm and Beyond: A Journey in Reducing Preventable Hospital Care-Associated Mortality and Harm," 2007 Physician Leadership Conference, Frye Regional Medical Center, Asheville NC, January 13, 2007.
102. "Pneumonia Order Set: The Journey in Developing, Adopting, Implementing and Evaluating a Standardized Order Set Across BHCS," Keynote Address, Garland Family Medicine Residency Annual Research Symposium, Garland, Texas, April 26, 2007.
103. "Pay for Performance in Health Care: An Overview and N of 1 Non-Randomized Trial Linking Health Care System Administrator Compensation to Clinical Quality," 6th Annual Southwest Cardiovascular Summit, Dallas, Texas, April 28, 2007.
104. "Accountability, Outcomes Assessment and Clinical Governance", Keynote Address, XVII Annual Meeting, Italian Society for Quality in Health Care, Reggio Emilia, Italy, November 7, 2007.

105. "The Potential Utility and Pitfalls of Applying Appropriateness Methods to Address the National Priorities Partnership Goal of Eliminating Overuse While Ensuring the Delivery of Appropriate Care: The Example of Cardiac Revascularization," Improving Health Care Quality and Safety Roundtable, Thomas Jefferson University, Philadelphia, Pennsylvania, June 5, 2009.
106. "The Double Failure of USA's Hospitals to Reduce Readmissions and Mortality: One System's Response," "Indicators at the Crossroad," 26th International Conference, International Society for Quality in Health Care, Dublin, Ireland, October 11, 2009.
107. "Journey to No Preventable Risk: The Baylor Health Care System Experience," VHA-PA, Harrisburg, Pennsylvania, December 5, 2009.
108. "Economics, Transparency, and Improving and Sustaining High Performance in Health Care," Global Business Forum, Waco, Texas, March 26, 2010.
109. "Improving and Sustaining High Performance across Baylor Health Care System," Commonwealth Fund Webinar, March 29, 2010.
110. "Improving Quality and Sustaining High Performance across Baylor Health Care System," American Health Association/Health Forum Leadership Summit, San Diego, California, July 23, 2010.
111. "Mortality Reduction Task Force: First Year Accomplishments and Future Challenges," Baylor Health Care System Board of Trustees Quality Committee, Dallas, Texas, July 27, 2010.
112. "Baylor Health Care System's Experiences with Initiatives to Reduce Heart Failure Readmissions," Leadership Institute, August 4, 2010.
113. "Costs and Productivity Effects of Health IT Implementation in a Primary Care Setting," International Society for Quality (ISQua) 27<sup>th</sup> International Conference, Paris, France, October 11, 2010.
114. "Transitional Care Program to Improve Heart Failure Outcomes," International Society for Quality (ISQua) 27<sup>th</sup> International Conference, Paris, France, October 13, 2010.
115. "Improving Patient Outcomes through Integrated Care Pathways for Stroke and Myocardial Infarction – International Experiences," International Society for Quality (ISQua) 27<sup>th</sup> International Conference, Paris, France, October 13, 2010.
116. "The Impact of an Electronic Health Record on Diabetes Care and Outcomes," International Society for Quality (ISQua) 27<sup>th</sup> International Conference, Paris, France, October 13, 2010.
117. "Baylor University Medical Center as Seen Through a STEEEP Lens." Baylor University Medical Center Annual Staff Retreat, January 29, 2011.
118. "Journey to No Preventable Risk: The Baylor Health Care System Patient Safety Experience." The First People's Hospital of Yunnan Province, Kunming City, China, September 13, 2011.
119. "Performance Measurements and Their Impact on the Development of Health Technology Assessment at Macro, Meso and Micro Levels: Applications to Cardiac Surgery." Keynote Address for the Fourth Annual Conference of the Italian Society of Technology Assessment in Health Care, Udine, Italy, November 19, 2011.

120. "Journey to No Preventable Risk: The Baylor Health Care System Patient Safety Experience." Saint Luke's Hospital Medical Executive Retreat, St. Luke's Hospital, Kansas City, Missouri, January 21, 2012.
121. "Journey to No Preventable Risk: The Baylor Health Care System Patient Safety Experience." Scott & White Healthcare, Temple, Texas, April 2, 2012.
122. "Journey to No Preventable Risk: The Baylor Health Care System Patient Safety Experience." Health and Wellness, Wal-mart Stores, Inc., Bentonville, Arkansas, September 12, 2012.
123. "Journey to No Preventable Risk: The Baylor Health Care System Patient Safety Experience." STEEEP Global Institute for the Yunnan Provincial Medical Investment and Management Co. Ltd., Dallas, Texas, October 10, 2012.
124. "Establishing & Sustaining a Culture of Patient Safety, Applications of the Baylor Health Care System Experience to the Mid Staffordshire NHS Foundation Trust Inquiry: What are the Cultural Changes Needed?" International Society for Quality (ISQua) 30<sup>th</sup> International Conference, Edinburgh, Scotland, October 13, 2013.
125. "Achieving STEEEP Health Care." Massachusetts Hospital Association Board of Trustees Retreat, Boston, Massachusetts, November 30, 2013.
126. "Achieving STEEEP Health Care." SIBF Nashville Business Forum, Nashville, Tennessee, April 25, 2014.
127. "Achieving STEEEP Health Care." 26<sup>th</sup> International Shingo Conference, Sandusky, Ohio, May 7, 2014.
128. "The BHCS Patient Safety Journey: Applications to Facilities Providing Rehabilitation Care." The 2<sup>nd</sup> Annual National Summit on Safety & Quality for Rehabilitation Hospitals, Washington DC, July 21, 2014.
129. "Achieving STEEEP Health Care." Mayo Regional Alumni Meeting, Dallas, Texas, February 28, 2015.
130. "Achieving STEEEP Health Care." Visiting Professor Grand Rounds, University of Kentucky Medical Center, Lexington, Kentucky, January 8, 2016.
131. "Achieving STEEEP Health Care", Stuart D. Cook, M.D. Master Educator's Guild 2016 Spring Symposium Rosenberg Lectureship, Rutgers Robert Wood Johnson Medical School, New Jersey, May 11, 2016.
132. "Making a Case for Quality." Robert Wood Johnson Barnabas Health, New Jersey, May 12, 2016.
133. "Achieving STEEEP Health Care." Quality and Safety/Risk Management Retreat, MedStar Health, Columbia, Maryland, March 23, 2017.
134. "Achieving STEEEP Health Care." Office of the Chief Quality Officer, Henry Ford Health System, Detroit, Michigan, April 11, 2017.
135. Novant Health Distinguished Lectureship, UNC Gillings School of Global Public Health,

Department of Health Policy and Management, November 16, 2018.

136. Keynote Lecture, Royal College of Surgeons of Ireland Group Inaugural Quality & Patient Safety Conference, Dublin, Ireland, May 17, 2019.

### **Selected Community Service and Philanthropic Activities**

- 2019 Co-Chair, 45th Reunion Committee, Class of 1974, The Lawrenceville School
- 2018-present Member, UNC Chancellor's Global Leadership Council
- 2016-present Morehead-Cain Partner/Morehead-Cain Scholarship Fund
- 2016-present Member, Executive Committee, UNC School of Public Health Capital Campaign
- 2011-present Funder of Kerr L. White and Edward H. Wagner Endowed Scholarship in the Gillings Global School of Public Health to fund health care research and policy studies in the School of Public Health by a UNC medical student
- 2012-2108 Member, Board of Managers, Baylor Health Care System-Select Joint Venture
- 2009-2018 Member, Board of Managers, The Heart Hospital Baylor Plano
- 2009-2013 Member, Board of Trustees, The Lawrenceville School
- 2007-2016 Member, School of Public Health Foundation Board, University of North Carolina
- 2007-2010 Member, Board of Trustees, Texas Hospital Association
- 2006 Mayo Laureate, Mayo Clinic Alumni Association
- 2005 The Doctors Mayo Society, Mayo Clinic Alumni Association
- 2004 Founding Donor, Student Health Action Coalition Endowment Fund, University of North Carolina
- 2004-present Chancellor's Club, Chancellor's Circle, Carolina First, The University of North Carolina
- 2003-present Red and Black Society, The Lawrenceville School
- 1991-present Life Member, The General Alumni Association, The University of North Carolina (# 24,213)
- 1974-2012 Annual Giving Class Agent, Class of 1974, The Lawrenceville School