Content Portfolio Advisory Group (CPAG): Roles and Responsibilities

Created April 2018; Revised December 2024

MISSION: Support the AIHA Board in aligning content (both emerging and existing priorities) to the profession's needs.

CHARTER: CPAG will establish policy and procedures to drive three goals: promotion of new content for the future state; maintenance or retirement of existing content; and management of stakeholders through communication, documentation, and process execution.

ORGANIZATION: The AIHA Board has determined that the role of the CPAG will be to guide the Board in resource allocation for content priorities that provide value to membership. As a result, the Board, volunteer group Board liaisons, the AIHA staff, CPAG members, volunteer group leadership, and members responding to open calls for working group assignments will each have defined roles, responsibilities, accountabilities, and authorities as stakeholders in the development and maintenance of content (e.g., published books, VG bodies of work, and frameworks,).

CONFLICT OF INTEREST: CPAG members must have a current Conflict of Interest (COI) form on file. CPAG members only need to submit a COI form once until potential conflicts change. Once a year, all members will be contacted and asked to update their form if any changes have occurred since the previous submittal. This form is now linked to your AIHA member profile.

PROCESS AND PROCEDURES:

Attachment #1 Content Portfolio Advisory Group (CPAG) members

Attachment #2 Process for the Strategic Identification of Content Priorities & Content Proposal Process

Attachment #3 Process for the Evaluation of Existing Content

Attachment #4 Content Managed Through the Content Portfolio Processes

Attachment #5 Content Priority Working Groups

STAKEHOLDERS TO THE CHARTER

AIHA BOARD MEMBERS/BOARD LIAISONS

ROLE: Provide leadership and direction to the CPAG chair to execute CPAG duties.

RESPONSIBILITIES: Approve CPAG recommendations and affirm CPAG activities align with AIHA's mission, vision, and values. Support CPAG initiatives through resource investment and priorities as recommended by the CPAG chair and the AIHA Program Director of Education and Technical Initiatives.

ACCOUNTABILITIES:

- Attendance at briefings and keen attention to CPAG efforts.
- Promotion of CPAG content priorities

AUTHORITIES: As defined by the AIHA Board.

AIHA STAFF

ROLE: Lead Project Manager, Technical Initiatives will review all proposals and documents. The Lead Project Manager serves as the CPAG Point of Contact and will coordinate meeting content and activities with the CPAG chair.

RESPONSIBILITIES: Lead Project Manager, Technical Initiatives will support CPAG in fulfilling its mission, ensure the maintenance of the CPAG web page and update the Board liaison quarterly on CPAG activities.

ACCOUNTABILITIES:

- Regularly update the status of the initiatives included on each content priority dashboard with support from the CPAG members and engaged volunteer group leaders.
- Manage the review process for new and existing content.
- Provide periodic updates (on emerging content and current content) to the AIHA Board.

AUTHORITIES:

- Propose actions and budgets to advance content development in a timely fashion.
- Engage the AIHA staff (e.g., education and technical initiatives) as appropriate in the content development and management process.
- Manage content progress (deliverables, schedule, budgets) in consultation with the AIHA Board liaison.

CPAG CHAIR

ROLE: Leadership of the CPAG team for effective content management as prescribed by the AIHA Board.

RESPONSIBILITIES: Guide the CPAG performance and promote collaboration between the Board liaison, AIHA staff, and CPAG members.

ACCOUNTABILITIES:

- Report to the AIHA Board for execution and leadership of the mission of CPAG as defined by the charter and the communication of progress concerning the pursuit of content development through volunteer groups and the AIHA membership.
- To the CPAG members for effective and efficient management of the advisory group.
- Serve as the liaison to various advisory groups and project teams to ensure that CPAG's interests are appropriately represented.

AUTHORITIES: In accordance with the AIHA Board liaison's guidance, to represent the CPAG in all matters of accountability back to the AIHA Board.

CPAG VICE-CHAIR

ROLE: Leadership of the CPAG team if the chair is unavailable.

RESPONSIBILITIES: Support the CPAG chair in the guidance of the CPAG team's performance and promote collaboration between the Board liaisons, AIHA staff, and CPAG members.

ACCOUNTABILITIES:

- Assume the role of the chair in the event the chair is not able to serve
- Assists the chair in the performance of their duties
- Serve as the liaison to various advisory groups and project teams to ensure that CPAG's interests are appropriately represented.

AUTHORITIES: Supports the CPAG chair in their absence.

CPAG PAST CHAIR

ROLE: Provides input and advice to the AIHA Board and staff regarding AIHA's body of content.

RESPONSIBILITIES: Support the CPAG chair in the guidance of the CPAG team's performance and promote collaboration between the Board liaison, AIHA staff, and CPAG members.

ACCOUNTABILITIES:
- Work with the chair in their leadership capacity to ensure continuity of the CPAG operations
- Participate in the development of CPAG's strategic plan and other presentation materials pertinent to CPAG's mission

AUTHORITIES: None identified.

CPAG MEMBERS

ROLE: CPAG provides input and advice to the AIHA Board and staff regarding AIHA's body of content. Content may include published books, VG bodies of work, frameworks, educational videos, apps, and eTools. CPAG has three primary roles:

1. Guide the content development plan for AIHA, including:
   a. Champion the Content Priorities and work with volunteer groups and staff, as described in Attachment #1.
   b. Review proposals for new content development initiatives in accordance with the content proposal process as described in Attachment #2;
2. Review existing content in accordance with the procedure outlined in Attachment #3.
3. Monitor the market and industry landscape to identify emerging topics for which new content may be needed.

RESPONSIBILITIES: CPAG members are expected to attend: one strategic meeting (for which AIHA will cover the cost if conducted in-person) and participate in monthly conference calls throughout the year. CPAG members are expected to put forth their best efforts to the collective action of the CPAG. CPAG members will support staff by promoting collaborative efforts to engage the right volunteer groups to create the best content possible. CPAG members will review and update, if necessary, this CPAG Roles and Responsibilities document annually.

CPAG members serve a minimum of 3 years. If selected to serve as vice-chair or chair, their tenure on CPAG will be extended. For example, if a CPAG member serves as chair in their third year, they would be expected to serve an additional year as past chair.

ACCOUNTABILITIES:

- Attend meetings and phone calls regularly.
- Seek updated information on the progress of CPAG initiatives when such meetings are missed.
- Execute responsibilities in a timely manner, as outlined in the attachments.
- Represent the interests of CPAG during collaborative efforts with AIHA staff, liaisons, and volunteer groups.
- Fulfill duties of a CPAG champion as outlined in Attachment #1.

AUTHORITIES: None identified.

VOLUNTEER GROUP LEADERSHIP

ROLE: Responsible for executing processes outlined by CPAG for evaluating new content needs, maintaining existing content, and responding to requests for project considerations when emerging priorities are adopted that are best served by the mission of those volunteer groups.

RESPONSIBILITIES: Engage in the research, development, testing, and maintenance of new and existing content.

ACCOUNTABILITIES: Timely response to content priority initiatives or actions.

AUTHORITIES: Address tasks in response to content priority assignments from CPAG, volunteer group Board liaison, or AIHA staff that satisfy consideration of assigned deliverables. Create action plans that meet the scheduled deliverables.

OPEN CALL RESPONDENTS

There may be an opportunity for an open call to research, develop, and test new content. Individuals selected will allocate enough time to fulfill the scope of the working group assignment, as defined in the open call. The working group will communicate progress to CPAG staff and their volunteer group Board liaison.

ROLE: Members selected for discrete working groups to research, develop or test content.

RESPONSIBILITIES: Allocate enough time to fulfill the scope of the working group assignment, as defined in the open call.

ACCOUNTABILITIES: Meet deliverables for the duration of the working group assignment.

AUTHORITIES: None

METRICS FOR SUCCESS
- Number of content proposals submitted to CPAG.
- Number of completed content priority dashboard initiatives.
- Other metrics as defined by the AIHA Board or CPAG.

Attachment #1: Content Portfolio Advisory Group (CPAG) Members

Six to ten members of the AIHA general membership will make up the CPAG; the number reflects the state of the CPAG program development. The following requirements are established as a general administrative procedure. The CPAG chair or AIHA Board is free to modify them at any time to serve the business needs of AIHA.

1. AIHA staff will provide an "open call" to membership seeking volunteers to self-nominate to replace vacated positions in May or as needed. CPAG members will rotate on and off at the AIHA Connect conference.
2. The CPAG chair, vice-chair, and Board liaison will evaluate nominee demographics, experience, and leadership capabilities. They will also consider the expertise and demographics of the current members of the CPAG to ensure the advisory group is diversified.
3. The names of proposed new CPAG members are conveyed to the AIHA Board for review and approval.
4. New members will be notified of the selection and the duration of their assignment.
5. CPAG members will be assigned a content priority either as the champion or to assist the champion. They will oversee the initiatives for that content priority (see Attachment #5).
6. CPAG members will review proposals for new content and existing content that is up for its five-year review (see Attachment #2 and Attachment #3).

CPAG members may be assigned other duties as deemed appropriate by the chair and Lead Project Manager, Technical Initiatives.

CPAG members, with at least one year of experience on CPAG, will self-identify if they are interested in being vice-chair/chair/past chair and communicate that information to the current CPAG chair and Board liaison. The chair, vice-chair, and Board liaison collectively confirm the incoming vice-chair position.

Along with the CPAG chair, AIHA staff will maintain the members' roster, start and stop cycle dates, and content priority assignments.

Attachment #2: Process for the Strategic Identification of Content Priorities & Content Proposal Process

CPAG evaluates emerging priorities, discussing what projects are envisioned and should be considered that align with AIHA emerging priorities. If ideas are suggested, they should be addressed with the relevant volunteer group. These ideas may take the form of new project submittal requests for the following calendar year(or the current year if there is bandwidth and no substantial costs are involved).

PROCESS FOR THE STRATEGIC IDENTIFICATION OF CONTENT PRIORITIES

1. High-level comprehensive research every five years with evaluation of content priorities.
2. Choose, define, and validate priorities.
3. Build a dashboard for each priority containing:
    a. Vision statements (What does our vision of success look like?)
    b. Initiatives (both what we would like to see and those underway)
    c. Action plan (what CPAG needs to do to promote development)
4. Promote the priorities and work on dashboard action items.
5. Review priorities annually to determine how the priority is progressing.
6. Communicate recommendations to sunset or add content priorities to the Board.

For NEW Content Proposals:

Step 1: The proposal is reviewed by AIHA staff, volunteer group chair, and the volunteer group Board liaison) concurrently.

Step 2: Comments are compiled, and an email is sent to members of CPAG to notify them that a proposal is ready for review.

Step 3: CPAG members are given approximately five business days to review the initial proposal and provide preliminary feedback to the project leader. The project leader is then given approximately five business days to modify the proposal based on CPAG's feedback. CPAG has approximately five business days to score the final proposal. The possible scoring decisions are as follows:

A. An overall average score of ≥3.5 means that the proposal has been approved without further discussion.
B. An overall average score of <3.5 means that the proposal is declined. However, the project leader can submit a new proposal or revise the current proposal to address, eliminate, or mitigate CPAG's concerns.

Step 4: Proposals for educational videos, publications, apps, and eTools EXCEPT Position Statements that CPAG has reviewed are sent to the AIHA Board for review and final decision-making. Depending on the complexity of the issue, the Board may decide via a vote by electronic ballot (generally within five business days and requiring unanimous agreement) or defer discussion until the next scheduled meeting. If a Board member recuses themself, this does not count against the unanimous agreement provision. That is, if the remaining members are all in accord, the proposal is approved.

There are two possible outcomes during this review stage:

A. The AIHA Board approves a project that CPAG has approved. If the proposal does not need funding, then the project leader and the originating volunteer group may start work. If the proposal is approved and requires funding, then the volunteer group officer will submit a funding request by July 1.
B. The AIHA Board disapproves a project that CPAG has approved. In this case, the project leader may submit a new proposal that addresses, eliminates, or mitigates the Board's concerns.

Step 5: Staff communicates the final decision to the project leader, proposal

sponsors such as the volunteer group chair or Board liaison, CPAG members, and any staff who provided input on the Board's decision.

Step 6: Once the manuscript has been drafted and peer-reviewed, the AIHA Board liaison(s) must review and approve the final document prior to being published.

For Position Statements:
Step 1: All proposals for NEW position statements must first be preceded by the development of a corresponding white paper (on a case-by-case basis a guidance document or other peer reviewed publication can be considered and will go through the normal CPAG/Board approval process).

Step 2: CPAG will perform an initial high-level review of the content proposal.

Step 3: After appropriate supporting content has been developed and CPAG completes an initial review, the position statement proposal is sent to the Board for final review and approval. The Board will evaluate whether the supporting content provides sufficient background and justification for the proposed position statement.

Step 4: Once the position statement has been developed, CPAG reviews the document and recommends the final draft to the Board.

Step 5: The final document must be reviewed and approved by the Board prior to publication.

Peer Review Process:
Peer reviewers play a critical role in the development of AIHA publications. Peer reviewers are subject matter experts on the topic covered by the document and provide feedback to authors for improving the quality and validity of the research presented in the manuscript.

If a book with multiple chapters is being reviewed, an author can be a peer reviewer of a chapter they did not write, but they shouldn't be the only reviewer of that chapter.

Peer reviewers are determined by the volunteers that develop the content. The

project leader lists the names of the peer reviewers and selects the peer review level when completing the content proposal form. Once a publication has been approved for development, the manuscript must go through the formal peer review process prior to publication. Depending on the nature of the content that the author submits, the level of necessary peer review will vary. There are three [peer review levels](#):

Level 1: Content requires peer review by independent members (non-authors) of the originating volunteer group. This content may be described as:
- Narrow in technical or scientific scope
- Covered entirely under the expertise of the originating AIHA committee
- Little or no controversy surrounding the subject matter

Level 2: Content requires peer review by independent reviewers (non-authors) from several technical volunteer groups. This content may be described as:

- Moderately broad in technical or scientific scope
- Relating to the expertise and interest of several AIHA committees

- Encompassing science policy issues amenable to broadly different interpretations and thus subject to potential controversy within the scientific community and AIHA

Level 3: Content requires peer review by multiple technical volunteer groups and selected independent outside experts. Outside experts are people that are outside of the project team and have not contributed to the manuscript. They do not need to be an AIHA member or part of a volunteer group and may be reviewing the manuscript on behalf of another organization. This content may be described as:
- Broad in technical or scientific scope and affecting many disciplines
- Directly concerning important non-AIHA stakeholders
- Having the potential to generate intense controversy within and outside of AIHA
- Having the potential to engage media attention or impact public policy

For more information on the peer review process, please review the following documents:
- [Ethical Guidelines for Peer Reviewers](#) (Required for Peer Reviewers to Sign)

- [Peer Review Process Flowchart](#)
- [Peer Review Checklist](#) (Required for Peer Reviewers to Sign and Complete)

The peer review process helps ensure that no author will be discriminated against based on content provided for the purpose of improving worker health and safety and that content focuses on science rather than any political, economic, or social goal.

Attachment #3 Process for the Evaluation of Existing Content

All publications are reviewed on a five-year basis by CPAG and the responsible volunteer group to ensure content is relevant and up to date. CPAG issues a recommendation on whether the content should be retained as-is, updated, or archived. Ultimately, the staff communicates CPAG's final decision to the author or proposal sponsors such as the volunteer group chair, or vice-chair.

Updated content will be available via access to the AIHA webpage, while **archived** content will not be visible. Volunteer group leadership may [request](#) access to archived content

For publications that need to be updated prior to their next review cycle, proposals must be submitted to CPAG for review and approval via the [Content Proposal Form.](#) Proposals for updates to existing content are not reviewed by the Board. AIHA staff may consult with the project leader regarding issues with content (i.e., vague statements, unclear references, potentially controversial material, and poor writing).

For Position Statements:
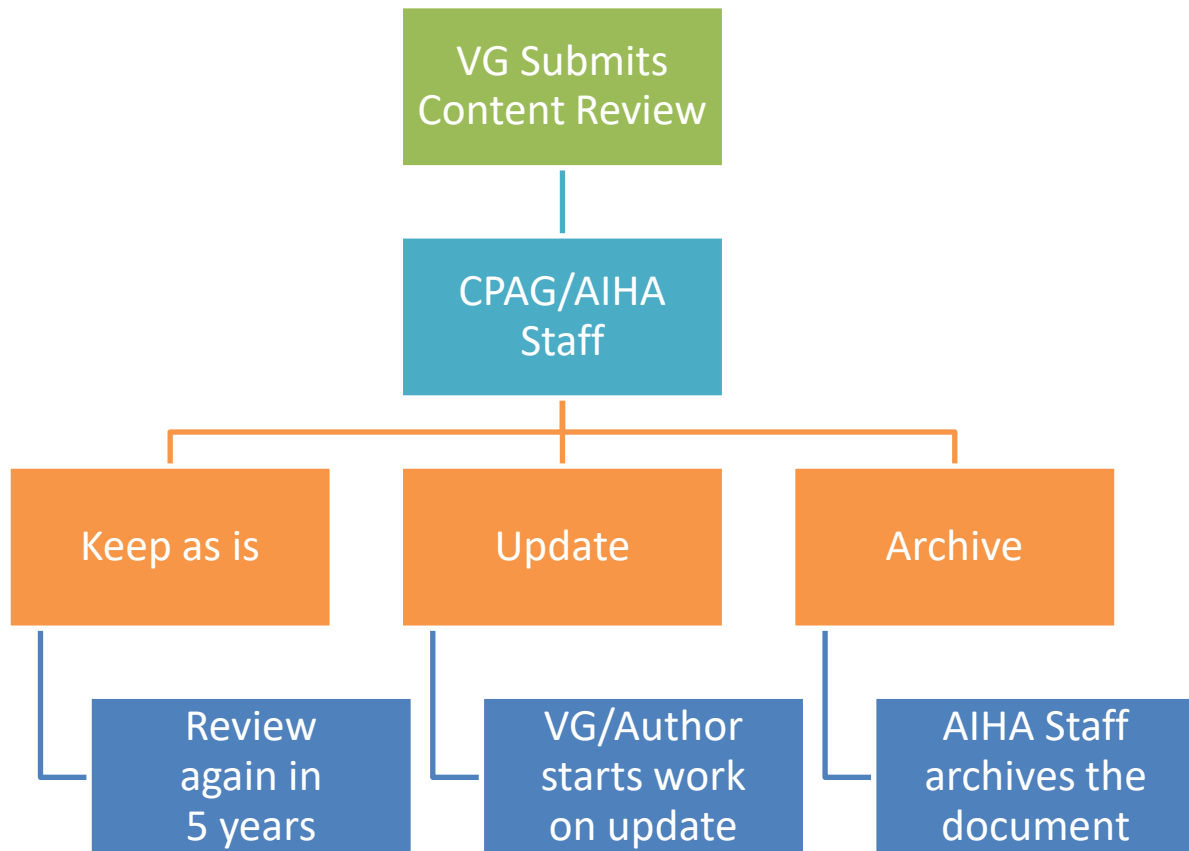**Step 1:** All proposals to update EXISTING position statements are initially reviewed by CPAG.

Step 2: After CPAG's initial review, the proposal is sent to the Board for final review and approval.

Step 3: Once the position statement has been updated, CPAG reviews the document and recommends the final draft to the Board.
Step 4: The final document must be reviewed and approved by the Board prior to publication.

Existing Content Flowsheet for graphical representation of this process.

```
            ┌─────────────────────┐
            │     VG Submits      │
            │  Content Review     │
            └─────────────────────┘
                       │
            ┌─────────────────────┐
            │    CPAG/AIHA        │
            │      Staff          │
            └─────────────────────┘
          ┌────────────┼────────────┐
┌──────────────┐ ┌──────────────┐ ┌──────────────┐
│  Keep as is  │ │    Update    │ │   Archive    │
└──────────────┘ └──────────────┘ └──────────────┘
       │                │                │
 ┌──────────────┐ ┌──────────────┐ ┌──────────────┐
 │   Review     │ │  VG/Author   │ │  AIHA Staff  │
 │  again in    │ │ starts work  │ │ archives the │
 │   5 years    │ │  on update   │ │   document   │
 └──────────────┘ └──────────────┘ └──────────────┘
```

Attachment #4 Content Managed Through the Content Portfolio Processes

Any AIHA published books, VG bodies of work or frameworks managed by volunteer groups are considered content. The following content is exempted because it is under separate processes maintained by AIHA functions:

1. Professional development course content developed by authors. Though not "owned" by AIHA, the review processes of the Continuing Education Committee assure that PDC selection aligns with the Content Portfolio objectives.

2. Conference Program Committee evaluated conference education.

3. Webinars and eLearning courses are evaluated by staff, considering member needs assessment.

4. *The Synergist*, a monthly magazine with in-depth news and information about the occupational and environmental health and safety fields and the industrial hygiene profession.

5. The Journal of Occupational and Environmental Hygiene (JOEH) is published both in print and online to enhance the knowledge and practice of occupational and environmental hygiene and safety.

6. Time-sensitive projects addressing a public health crisis or natural disaster may be exempt from the official CPAG content proposal process, with concurrence by staff and communication to the Board.

7. Content proposals for document translations are reviewed by AIHA staff, the leaders of the relevant volunteer group, and the volunteer group Board liaison). Comments are compiled and sent to the AIHA Board for review and final decision-making.

8. Any other books (e.g., memoirs, non-technical publications) that fall outside of the parameters defined for CPAG review.

Attachment #5 Content Priority Working Groups

The purpose of a Content Priority Working Group is to identify potential initiatives to support the content priority and help move them forward through the AIHA processes.

ROLES AND RESPONSIBILITIES

A.   CPAG Working Group Members

1. One CPAG member will be identified as the champion for each content priority. Another CPAG member may participate as assistant champion.

2. The champion will act as the facilitator for the team, ensuring that the appropriate parties are involved, and that regular communication occurs. The champion will gauge the progress of the content priority initiatives and schedule calls accordingly.

3. The champion will work with staff to update the dashboard in collaboration with volunteer group members.

4. The CPAG champion can provide encouragement and advice; however, they are not setting or managing expectations for delivering the volunteer group initiatives' content. If the CPAG member thinks that the volunteer group is not delivering, then the CPAG member should communicate that to the staff for consideration and further action per B.3 below.

5. CPAG members will communicate that submission of a proposal does not ensure approval. Approval will depend on the entire CPAG team's input and the AIHA Board's final decision.

B.   AIHA STAFF

1. Staff will post the current dashboard to the AIHA website.

2. Staff will work directly with members of the volunteer group regarding the timing of deliverables and logistics related to the initiatives.

3. **Volunteer Group Board Liaison(s):** Board liaisons may participate on the team if connected to a volunteer group participating in the CPWG. The Board liaisons' role is to provide advice and counsel to the group.

4. **Volunteer Group or other AIHA members:** Volunteer group leadership or staff may identify key subject matter experts to participate with the CPWG, depending on the initiative identified.

5. Volunteer group members are not expected to be on every call of the CPWG. However, they are expected to provide regular status updates on initiatives in which they are involved. They are welcome to participate in all calls of the CPWG.

6. The volunteer group members will work with other members to move their initiative(s) forward.

PROCESS

A. Identify the Content Priority Working Group members

1. A CPWG maybe identified for each content priority.
   a. Members of the CPWG will include a CPAG champion, an assistant champion, and AIHA staff.
   b. Members of volunteer groups, other interested AIHA members, and the associated Board liaison(s) will be considered 'ad hoc' members of the CPWG, depending on their involvement with specific initiatives.
      i. AIHA will proactively invite volunteer group members or other AIHA members to participate as ad hoc members with the CPWG. This collaboration may be done by either contacting the volunteer group directly or putting out a general request for participation through the Catalyst open forum or an open call.

B. Develop the Dashboard

1. The CPWG will help develop and refine the content priority dashboard, which identifies the priority's vision statements, initiatives, and proposed actions.

2. The CPAG champion has the lead role in managing the dashboard.

3. Input to the dashboard will be a collaborative effort between CPAG, volunteer group members, and staff.

4. The CPWG will make regular updates (i.e., at least quarterly) to the dashboard to reflect the initiative's status (e.g., action items).

C.   Communication

1. The team will communicate regularly (e.g., through periodic calls, or regular emails).

2. Periodic calls (i.e., at least quarterly) will be held to review initiatives (current and proposed) and make updates on action plans.

   a. One goal of the calls will be to prioritize the initiatives and identify the most important ones to move forward.

   b. Another goal is to identify each initiative's status and determine if any activities are needed to help them move forward.

3. The CPWG may assist volunteer group members in moving their initiative forward, such as counseling them on aspects of their proposal.

4. Key members of the associated volunteer group will be invited to the calls as appropriate, depending on their involvement with specific initiatives.