

~~Collaboration~~

The Partnership Handbook: Tips and Tools for Establishing and Furthering Collaboration

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Objectives

1. Describe factors to consider when choosing partners.
2. Evaluate best practices in collaborative management.
3. Integrate relevant best practices into your CME collaborations.
4. Understand the importance of continuous quality improvement to ongoing collaborations and strategies to use in making course corrections.

Definitions

- Collaboration vs partnership
- Collaboration is a recursive process where two or more people or organizations work together in an intersection of common goals—for example, an **intellectual** endeavor that is **creative** in nature—by **sharing** knowledge, learning and building consensus
- Partnership is a structure where partners share in profit or loss

Why Collaborate

- Collaborations make better decisions
- Collaborations can solve more complex problems
- Collaborations do more to enhance creativity and build skills
- Collaborations can respond quickly to changing condition

Blanchard et al. *Leading at a Higher Level*. 2009.

Our Experience

- 9 partners
- 148 certified activities, including 4 PI projects
- Over 29,000 learners
- 10 communities
- Over \$17 million in grant funding
- Share needs assessment and outcomes strategy
- Change in patient health demonstrated

Factors That Influence Collaboration

- Environment
- Membership
- Process and structure
- Realistic goals
- Purpose
- Leadership



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Environment

- Leader in the community
- Reflect political environment



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Membership

- Respect and understanding
- Trust
- Appropriate cross section of players
- Consistent with organizational missions
- Ability to compromise
- Stake in both the process and the outcome



CS2day Partners



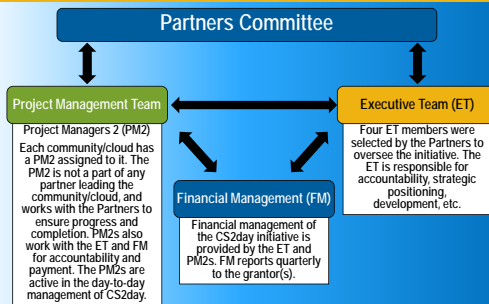
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Process and Structure

- Multiple layers of participation
- Clear roles and guidelines
- Appropriate pace of development
- Communication
- Flexibility
- Adaptability
- Personal connection

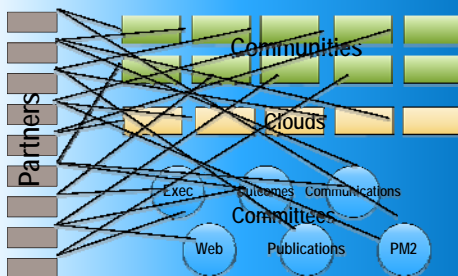
Structure



Multiple Layers of Participation



Multiple Layers of Participation



Roles and Guidelines

- Each community and cloud has a project manager within the organization implementing the activity (PM1)
- Each community and cloud has a project manager external to the organization leading the activity (PM2)
- Milestone documents track progress and trigger the release of payments
- Project numbering scheme allows for activities to be referenced consistently across partners

Financial Management

- Top 10 and quarterly reconciliation report
- Quarterly evaluation of progress toward meeting milestones
- Create reporting process up front
- Full financial transparency among partners



Agreements

- Partnership agreement
 - Intellectual property
 - Non-compete
 - Governance
- Agreement with commercial supporter
- Structural LOA



Change Happens

- Change order process
 - PM1 coordinates with PM2
 - Approval by Executive Committee
 - Disclosure to partners
- Bid for best price
- Rely on partnership agreement



Communication

- Stakeholders
- With partners
- With communities



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Realistic Goals

- Clear attainable goals
- Shared vision



How to Measure Success

- Outcomes
- Financial
- Alliance award
- Learners
- Web site visits
- Smoking quit rates



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Purpose

- Unique purpose
- Significant funds



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Leadership

Executive Team (ET)

Four ET members were selected by the Partners to oversee the initiative. The ET is responsible for accountability, strategic positioning, development, etc.



Leadership

- Some form of leadership is necessary
 - Internal
 - External
- Our model is strong central leadership with approval of partners
- Remember Goldilocks



Other CME Issues

- Accreditation
 - Single accrediting body or multiple
 - ACCME reporting of commercial support dollars
- Conflict of Interest
 - Whose disclosure policy will be used?
 - Who will provide content review?



Critical Messages

- You can't just come along for the ride
- You have to let your proprietary ego go—and work in the framework of the public health issue
- You must know your institutional/organizational strengths—what are you the best at doing? How can you bring those skills and abilities to help make the overall project successful?



Critical Messages (cont.)

- Step back if someone else is better at a particular task/skill
- You have to be willing to take some risks
- You need to have support from the top of your organization
- Not everyone needs to be a partner; there are multiple layers of involvement that can support collaborations
- You will learn a lot
- Stay focused on your clinical objective



Questions

Thank you for attending.

