Resource for Collaborative AHEC Work

Intro

NC AHEC believes in fostering an equitable and collaborative process to efficiently respond to partner requests, collectively decide what the work should be, and fairly share roles. NC AHEC has a long history of collaborative work among regions, disciplines, and service lines. As this collaboration continues, the use of a common resource that guides our statewide and multi-AHEC work is beneficial. This document was created with collective input in response to multiple requests and recommendations from AHEC colleagues across a variety of roles with the intent to provide resources and recommendations to streamline processes, assist in avoiding duplication, and suggest better practices for collaborative work. This is *not* prescriptive and may be leveraged as appropriate when planning and executing statewide, multi-regional, and/or multi-service line projects, especially those that are crosscutting and have an impact on multiple regions (beyond single-region CPD being marketed statewide).

Exploring New Projects

When exploring new projects, you may want to consider the following:

- Does it align with the NC AHEC mission and vision, contribute to the results statement, and Strategic Plan?
- Is there a demonstrated need in your region(s) and/or statewide? Why is this project important?
- Is there capacity within the Program Office (PO) and/or regions? Have you considered what resources may be needed and are available?
- Do we have the ability to meet the funder's requirements (evaluation, reporting, deliverables, etc.)?
- Is the project financially feasible?
- Was a member of the PO and/or Regional finance, IT team, and any relevant service line included in early conversations?
- If multi-regional or statewide, have all parties been included in the planning from the beginning?
- Have you considered the possible unintended consequences?

Resources of other AHECs or the PO should not be committed without prior consultation. The PO will not commit Regional AHECs to work without consultation.

When contacted by or exploring projects with a NC state government organization or if you anticipate a large Docebo event (500+ participants), please complete this form to the best of your ability. This process was developed in order to operate as a system and not duplicate work, as well as to help monitor strain of the IT system. The PO will confirm this information was received and may schedule a follow up conversation if additional discussion is necessary. If the PO is approached by a NC state government organization with work that may affect Regional AHECs, the PO will consult with Regional AHECs before committing to do the work.

These resources may be helpful when exploring new projects:

- CPD Activities Information Gathering Document: Examples of helpful questions to ask when speaking with a prospective partner. If you wish to access the back end of this form, please contact Caroline_Collier@ncahec.net.
- Grant Scoring Matrix: Example of a tool that can be used when exploring funding opportunities (provides rating of strength of opportunity).

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This is a living document and will be updated as new learning occurs–we welcome suggestions and continued feedback that would improve the usefulness of this document (send to Lisi Martinez Lotz at Lisi_Lotz@ncahec.net).

Determining Roles and Formalizing Partnerships

Because projects often include multiple partners, it is necessary to determine the roles of each early on (i.e., Lead, Partner AHECs, Program Office, Funders, and External Partners). The Lead AHEC and Regional AHEC(s) should work together to identify the capacity and strengths of each partner and how they want to be involved. Some projects will present opportunities to learn skills from each other or to leverage unique existing skills that a Region has.

The AHEC Cohost MOA is used to assign roles and responsibilities for CPD events; this tool can be adapted for use across multiple service lines to assign tasks to each partner. Be aware that some tasks may have unintended consequences (e.g., marketing allotment use per AHEC, time processing registration fees). Much of what is decided can then be incorporated into contracting. Once roles have been determined, it can be helpful to have a visual representation of the progression of roles and responsibilities for involved partners. A swim lane diagram is an option for depicting these relationships.

Request for Proposals (RFP) process

For some projects it would make sense to do an RFP because it is not clear which Regional AHECs are involved. It might come from the PO to determine a Regional Lead, or from a Regional AHEC already designated as a lead to determine additional roles within the project. It may be appropriate to convene an RFP committee to review submissions per opportunity made up of multiple Regional AHECs (that did not respond to the RFP) and PO staff. Here is an example RFP that can be adapted. Other times, an RFP is not appropriate. For example, when a grant opportunity arises that AHEC is interested in applying for, an email is sent out to form an exploratory committee.

Establishing Group Dynamics

It is helpful to establish a foundation when a group first meets. Some ways to do this include establishing group norms, developing a charter, or incorporating team building activities into meetings. Having a facilitator, well-defined roles and objectives, and a regular meeting cadence keeps projects on task and on track.

Depending on the project, you also may want to establish work groups to execute specific deliverables (e.g., summit planning team, toolkit development team). Work groups should also have well-defined objectives, deliverables, and a regular meeting cadence with progress updates. The Lead AHEC may also choose to have individual meetings with partners to ensure that there are clear expectations and that both parties are aligned on how to work together.

Determining Purpose of Project

When starting a project, determine what you want to accomplish by developing specific outcomes. Some ways to do this include developing a results or impact statement, objectives, goals, priorities, strategies, etc. This is not prescriptive; the point is to have a clear purpose for the project. Below are some examples of how to determine the purpose of a project:

Impact Statement

It may be helpful to create an Impact Statement early in the project planning process to help inform decision-making, collaboration, development of scope of work, and deliverables. Below are questions to consider when developing an Impact Statement:

- What is the issue or problem your project/program addresses? Why is it important?

- Does the project align with the NC AHEC mission? Does it contribute to the NC AHEC result statement?
- Who will benefit from your project? (Who are the customers?)
- What is the customer impact desired? (How will you measure if your customers are better off?)
- Which AHECs are involved in your project? Include collaborators outside the AHECs.
- What strategies/actions(s) are you taking or intend to take to address the issue or problem?
- What is the scope of your project?

Objectives

Setting program objectives helps focus the purpose, determine benchmarks, and communicate how we achieve our outcomes. Objectives are also necessary to evaluate specific components of a program and measure program performance. They may be process or outcome oriented, and you usually need multiple objectives to address a single goal.

Building Budgets, Contracts, and Distributing Funding

Working With Funders and External Partners to Build Budgets

Funding is sometimes sought out by NC AHEC or regional AHECs, while other times a funder approaches NC AHEC with a scope of work and questions about a potential budget. As the people doing the work, NC AHEC is often best suited to know what funding is needed to accomplish the deliverables and achieve project outcomes.

It is important to have a clear understanding of how the scope of work and budget align. Planning contract and grant budgets requires consensus from key personnel who will work on deliverables, finance, and IT. Projections for expenses should be calculated based on existing and future costs and should include room for reasonable growth over the course of the project. It may be important to negotiate with funders when they add deliverables mid-project. NC AHEC provides high-quality, low-cost services to its partners; therefore, it is recommended to renegotiate the contract, rather than provide our services for free. It is encouraged that we recognize the value of what we bring to our partnerships.

If a program involves special reporting arrangements that require the services of Statewide IT/Data Analytics, this should be discussed with the PO prior to signing the contract. If the program will leverage online LMS platform (Docebo) and has an audience larger than 500 people, then the PO asks to be notified using this Smartsheet in case provisions need to be made for a Docebo overage surcharge.

When working with other Regional AHECs, set expectations and confirm responsibility – the AHEC Cohost MOA is a great start. Many regional AHECs that use this form refer back to it in progress meetings as their meeting structure/template. Below are some additional finance-related things to consider when AHECs partner.

- Ensure funding is adequate to complete the project deliverables.
- Discuss how the benefits of the project will be split equitably (money, attribution etc.) and how regions will be reimbursed for their work.
- Invite finance representation (from the AHEC holding the funds) to the planning committee.
- Sustainability of the project – Is future funding needed?
- Debrief budget when closing out project – Was it profitable? Lessons learned?

Developing Deliverables and Quality Improvement

NC AHEC is skilled at creating programming and deliverables, thanks to a strong team of experts across disciplines and service lines. Engaging relevant staff–and working collaboratively across disciplines and service lines–is key to a successful project. For example, a Practice Support project with a CPD-related deliverable should engage a CPD planner in early conversations to provide necessary information about CPD-related logistics and timelines. Similarly, it may be a good idea to involve Discipline Chairs or regional discipline leads, who can provide an IPE lens to determine if other disciplines should be included.

There is a plethora of valuable resources available to leverage when working collaboratively to produce deliverables:

- The E-Learning Software and Tools Supporting CPD describes which tools we have access to, who owns them, and what trainings on these tools are available. Use of these tools could impact the owner of the product licenses.
- The NC AHEC Intranet hosts a variety of resources, including recordings of office hours, guidelines, and recordings of AHEC Learning Academies. It is accessed through "Courses and Events" in MyAHEC. If you don't have access to the Intranet, contact IT support at support@ncahec.net.
- Multi-AHEC projects should have a plan for consistency in branding and overall look and feel of modules, slides, etc. For example, guides were developed for partner regions using Docebo and CASCE to create consistency among modules.
- It is helpful to use process improvement tools as a group periodically throughout the life of the project. There are many options to turn to, but here are a few that may be useful for quality improvement.

There are a few IT recommendations to consider. If the event could attract a large audience, setting a simple fee structure for an event speeds registration and reduces administrative load. Consider adding in provisions for grant-sponsored asynchronous programs that cap the number of participants supported by the grant so that NC AHEC can charge appropriate fees should the course become more popular than intended and possibly incur Docebo overages.

For any course, using the Web Services-powered Online Landing Page gives the program a common place to find all information for registered participants. There are also online exhibitor areas that are implemented in such a way to provide the correct separation between exhibitors and courses as specified by the AMA.

Be clear with funders about what will be reported and ensure that the level of reporting they desire is in alignment with the AHEC Privacy Policy. If not, make provisions to get user consent. If the reporting needed for the funder requires Statewide IT intervention, please contact Ashley Langley (Ashley_Langley@ncahec.net) prior to entering into an agreement. Setting up necessary infrastructure for reporting such as reserved keywords or statewide tagging early leads to success moving forward. Leaving reporting to be determined later can often lead to scope creep in the project.

Communications Plan and Marketing

Internal and External Communication

Strong internal communication helps to ensure the team understands the purpose, goals and objectives, and desired outcomes of the project. Transparent communication also leads to better collaboration and stronger relationships. When clear communication doesn't happen, assumptions may be made, there may be lack of clarity in roles, and ultimately this could cause the project to suffer or for deliverables not to be met. These are examples of how to put communication into practice:

- Develop a communication plan that identifies appropriate and timely actions (i.e., who, what, when, how, and how often)
- Find a communication system that works for all (e.g., basecamp, teams, email, etc.)
- One entity/staff member should be responsible for ensuring communication occurs.
- Establish a document storage system (e.g., Basecamp)
- Consider creating an “orientation slide deck” that covers roles, aim, partners, stakeholders, etc.

Likewise, strong external communication allows partners, funders, and stakeholders to better understand program scope, see progress, and see opportunities for engagement and/or collaboration. Consider what groups you want to keep in the loop and what format is best suited to communicate updates (e.g., slide deck, word document, newsletter, etc.). Consider whether there are partners and stakeholders that have not been engaged in the past, including those representing historically marginalized populations.

Marketing

When multiple Regions and/or the Program Office is involved, partners need to be aware of requirements for consistent and cohesive branding. Please see below for resources to help navigate this process:

- Statewide Brand Guidelines
    - Regional vs. NC AHEC branding: For CPD programs, when statewide branding should be incorporated is determined by CPD planners following the CPD policy workflow.
    - Multi-regional programming policy for brands: If the project is not classified as a statewide CPD program, Regional AHECs can co-brand using the best practices outlined in our Email marketing guidelines.
    - Note that flexibility is often required when working with external brands. Questions about the statewide brand guidelines or its materials can be sent to Caroline Orth at caroline_orth@ncahec.net.