Appendix A: Academic-Practice Partnerships Implementation Tool Kit

The information below should be used alongside Appendix A: Academic-Practice Partnerships Partnership Expectation and Outcome Matrix: Step-by-Step Planning Tool.

Players

A: Selecting Partners

1. How do you identify your partners?
   a. If you are a dean in an academic health center, you have many well established potential partners in the schools of medicine, pharmacy, business, and allied health. If you are a dean or director in a school or department of nursing that is not in an academic health center, are there schools of medicine, pharmacy, etc in your city or surrounding area that you could partner with? You should think about what partnerships do you want to expand around a focused area of interest.
2. Why is this partner a good fit?
   a. Does your potential partner understand your programs, your goals, your vision? Do you have a common ground and shared vision? Is this partner approachable and available? Have you tried to reach out to this partner?
3. How do you approach your potential partner? How do you make the appointment with the right person? Who is the right person?
   a. The first step is finding out who the right contact person is. Use your networks to collect this information. Then, pick up the phone or send an email. Be clear on why you are contacting the potential partner.

B: Preparing for Your First Meeting

1. Where do you meet?
   a. Offer to host the first meeting… but basically meet wherever is most convenient for your potential partner.
2. What do you need to know about your potential partner and his or her organization? What does your partner need to know about you and your organization?
   a. Be sure to come prepared having read anything you can on your potential partner and organization to assess a fit for partnership and shared vision. Bring information about your organization with you to the first meeting. Think in advance about your vision and goals for the partnership and what you bring to the table. Think about what your potential partner brings to the partnership in advance.

Partnership Activities

A: Initial Meeting

1. What is the right partnership activity for you and your partner?
   a. There may be many possibilities for partnership initiatives. Which ones fit into your strategic plan? What are your priorities? What are your strengths that would augment the partnership?
2. What documents about your organization might be helpful to bring to the first meeting?
   a. Some relevant documents may be your strategic plan, curriculum, list of faculty and staff roles, accomplishments and ongoing projects.

3. What do you have to offer?
    a. This could include faculty and staff expertise, an established curriculum, a grant writer, budget assistance, track record in publication, contacts/networks.
4. What is the mutual benefit?
    a. Identify what you want to accomplish for your strategic vision and what might be of benefit to the partner. This could be joint programming, clinical experiences, leadership opportunities, professional development, or a larger scale organizational commitment.
5. What is your vision?
    a. Be sure to identify this before the first meeting and be able to clearly communicate this.
6. Does your potential partner share this vision?
    a. Ask this question directly. If the answer is no, address related possibilities for partnership or decide that the partnership would not be strategic at this time.
7. What is the potential initiative/activity and who else needs to be involved in both organizations?
    a. Have some initial ideas before the first meeting. Be prepared to brainstorm, prioritize, and compromise.
8. Who is the top leadership in the organization? Are you talking to them?
    a. Be sure to be talking to the person in the organization who is the decision maker. If at the first meeting, you determine that the person with whom you are speaking is not the decision maker, ask for guidance on who this person may be.
9. What is the business case for the partnership?
    a. Once you decide together on the inter-professional initiative, together discuss the ROI. Determine how much the initiative will cost each organization and what the return on investment is for each partner. Determine whether or not there is financial value to each partner. If not… abort the plan and start over.
10. What are the next steps? Do you have a timeline established at the end of the first meeting?
    a. Identify these together with your partner before you leave the first meeting. Write them down!
11. Be sure to send a thank you note with next steps delineated.
    a. One good next step is to begin to draft a memorandum of understanding where you articulate the shared goals and vision as well as potential partnership activities. Be clear on who is responsible for what and how costs will be shared. Another idea is to spend some time getting to know your partner personally. Partnerships based on personal relationships ten to thrive due to shared commitments on many levels. Share a dinner or lunch to discuss next steps.

B: Subsequent Meetings

1. Do you have clarity on goals and vision?
    a. Are your goals written and clearly defined?
2. What are the details and timeline of the initiative?
    a. Do you have clarity and mutual understanding?
3. What resources are needed?
    a. Who will provide them? Are the resources shared?
4. Whom can we call for expert consultation if need be?
    a. Will there be an official MOU?
5. What are the expected outcomes of the activity?
    a. How will they be evaluated? How will results be disseminated? What is the order of authorship?

Environment

A: Time

1. Is this the right time for this partnership?
   a. This needs to be determined early in the discussions. Partners should determine if there are sufficient resources to support the partnership at this time.
2. What are the issues that will facilitate or impede the development of the partnership?
   a. Leadership support and a shared vision are essential to the success of the partnership. Be sure to address any historical relationship issues between the partners.
3. What is the time commitment for the partners?
   a. Create a timeline for the partnership activities and identify time needed for ongoing work. It is important that the time commitment is shared equally by both partners.
4. Whose time will be required?
   a. Break out responsibilities for those involved, so not everyone need attend every meeting. Clarify roles and link time to the role expectation and expected outcomes. Each partner should determine who on their respective teams should participate. This may be difficult for small organizations with few staff. For skilled nursing facilities it may be difficult to identify staff who can work with academe.
5. When will the meetings be scheduled? Are they on a regular basis and frequent?
   a. Distinguish between meetings that must take place to perpetuate the partnership and those ongoing meetings among the players and partnership participants. Limit meetings to an agreed upon time depending on purpose. Keep in mind that schools and health care facilities are not on the same calendar.

B: Space

1. What space is required for the activity?
   a. Explore specific needs: access to computer; alternating meeting sites, etc.
2. What equipment or supplies are needed?
   a. This will vary depending on the particulars of the partnership and the project activities.
3. What money is needed?
   a. Identify “real” versus in kind resources needed for each aspect or phase of the project/partnership. Create a business plan that addresses resources needed.
4. Where are we meeting?
   a. Alternating between partners’ facilities may be ideal but not practical. The site for each meeting should be determined based on the focus of the meeting and the participants.
5. Where will we present outcomes?
   a. Present “globally” and locally—at both the school and the facility, with the partners from each organization in attendance at each presentations.

C: Regulation

1. What are the policies or regulatory issues that will impede or facilitate development of the partnership on both sides?
   a. Each partner has its own unique regulatory issues that the other may not be aware of. Share relevant policies as needed to inform practice and academic partners of the unique requirements of each.

D: Context

1. How will the partnership be funded?
   a. This must be determined early on, in the initial stages of the partnership. Discuss resources, resource sharing, in kind contributions, and potential funding opportunities. Develop a plan for funding the partnership. Depending on the nature of the partnership, consider a formal business plan.
2. What are the constraints of both partners?
   a. Identify time, space, and human resource constraints and develop strategies to address them.
3. What history do the partners have with each other and each others' institutions?
   a. Be knowledgeable about the historical and current political and personal relationship. A history of collaboration between the two organizations can go a long way in supporting the success of the project.

To view exemplars, please visit AACN's Academic-Practice Partnership page at **https://www.aacnnursing.org/our-initiatives/education-practice/academic-practice-partnerships**.