

Effective collaborator engagement is a core program leadership competency. It should be built into a regular flow, at least annually, to listen for changing priorities and to plant seeds for future program goals. Being prepared and proactive now will identify risks and themes that your program can incorporate in priorities, planning, and resource management.

**Tip: It is not necessary to do a lot of meetings or interviews; 1 to 3 in the most relevant category may be plenty. The descriptions and examples are intended to prompt your thinking.**

It may be useful to think about at least four categories of collaborators:

1. **Leadership:** Who are the formal leaders that evaluate your work and must advocate for you? Are they well equipped to connect the dots between your work and bigger organizational goals? Do they see you as a problem solver who can deliver? Remember that in a complex organization leaders are balancing many needs; how can you simplify and align, vs. trying to explain why you are “different”?
2. **Financial/business staff:** Who defines budget parameters for the organization (or your division), and who may be responsible for developing recommendations on investment or budget cutbacks? The people developing budget forecasts and at the planning table with senior leadership have a very important role. Do they understand what your program does and how it influences care quality, costs, and workload or efficiency of others?
3. **Collaborators and sponsors:** Which leaders have influence with senior leadership and impact high profile revenue streams and/or critical and constrained resources (bed capacity in the ICU, for example). Often this includes nurse leaders, department managers, and physicians such as surgeons, cardiologists, oncologists, intensivists, and hospitalists. Having strong friends connect-the-dots between their performance and your program can be very effective. Engage early and develop shared goals with explicit assumptions. Develop a bigger value propositions together.
4. **Funders:** Consider opportunities to work more closely with the Development Office or local foundations that may help fund program expansion (new roles, settings, or additional triage and referral locations).

**TIP: Engage your team in this process. Who do they think is a key partner? Do they have relationships or interest in helping? What do they want to know? The more they are engaged, the more buy-in they have to the process, and the less fear of the unknown.**

## IDEAS FOR RELATIONSHIP-BUILDING

<b>Leadership</b>  Who do you report to? Who do they report to?  Which executive leaders are your formal or informal sponsors?  Who may have perspective on new value and ways to fund your program?	<b>Examples</b>  Section Chief, Department Chair  CMO, VP of Nursing, CEO  Population Health VP, business development team, non-acute services manager	<b>Goals of Engagement</b>  Test the waters: Get early warning signs re business challenges and priorities  Influence the narrative & measures re: your program  Introduce attractive options for program priorities so they start to include these in plans
<b>Finance / Business Staff</b>  Who preps performance reports and budget documents for your leadership?  Who builds out models of cost/benefit in the organization? Understands impact of quality measures like readmissions, CAHPS scores, etc.?	<b>Examples</b>  Departmental managers & finance administrator or analyst  Quality department manager, staff within Pop Health or CMO staff?  Health plan contracting	<b>Goals of Engagement</b>  Develop a relationship of trust  Influence the narrative & measures re: your program  Introduce areas of impact from your program that may not be well-understood
<b>Colleagues</b>  Who influences budget priorities and has power and credibility?  Who knows your program's good work and/or its challenges?  Who are your main sources of referrals? With whom to do you partner to deliver quality care to patients and families?	<b>Examples</b>  Surgeons Oncologists Neurologists Nursing leaders Patient advocates	<b>Goals of Engagement</b>  "Protection" when you are not in the room (someone else to tell your value story)  Interdependencies – value through impact on others' capacity and results  Competition – they want you to have capacity to help them
<b>Funders</b>  Who knows private individuals with means, has relationships with local foundations, manages development, or sits on boards?	<b>Examples</b>  Use good etiquette & start with your organization's development office.	<b>Goals of Engagement</b>  Develop a process to be on the radar; offer to help  Convey a compelling wish list  Clarify your program's impact on community well-being