

Defining and Clarifying the Roles of Each Organization within a Partnership

Getting clear agreement on the specific roles of each organization is critical to successful partnerships between community-based organizations (CBOs) and health care organizations (HCOs). Here are a few key points for you to consider when defining and clarifying roles.

Clarify the type of partnership

Partnerships between CBOs and HCOs can take many forms. The table below shows some examples.

Example Models for CBO-HCO Collaboration and Integration

Informal Collaboration	Formal Partnership	Integration
<ul style="list-style-type: none"> • Informal referral arrangement • Information sharing • Joint planning 	<ul style="list-style-type: none"> • Co-location • Project-specific MOU • Grant funding pass-through • Fiscal agent • Administrative consolidation • Formal co-education • Preferred provider referrals • Resource sharing / contracting (cash, staff, electronic health records, etc.) 	<ul style="list-style-type: none"> • CBO expands to provide primary care in addition to treating HIV and related conditions / restructures to form an integrated model of care, e.g. a medical home/health home, FQHC, community health center, free clinic, or Accountable Care Organization • Merger • Affiliation • Acquisition • CBO closes and transfers clients to HCO and/or staff are absorbed into HCO

Clarify leadership roles

What will be the responsibilities, roles, and reporting arrangements of each organization’s CEO after the partnership begins? What will stay the same, and what will change?

If necessary, engage an outside consultant. A professional consultant or facilitator can help ensure that you have these conversations and make tough decisions about roles in a timely manner.¹

Clearly communicate provider roles to patients. Make sure that patients and family caregivers understand the roles of all providers who are involved in the patient’s care.²

Prepared by: Meaningful Evidence, LLC for NMAC’s Capacity Building Division

Sources:

1. Haag, R. 3/27/2014. “How to Check Your Ego and Three Other Keys to a Successful Nonprofit Merger.” *The Bridgespan Group*. www.bridgespan.org
2. American College of Physicians. 2010. *The Patient-Centered Medical Home Neighbor: The Interface of the Patient-Centered Medical Home with Specialty/Subspecialty Practices*. Philadelphia: American College of Physicians: Policy Paper.