

Who this guidance is for

Healthcare organisations in England, industry leaders and those leading on the partnership and transformation agenda within their organisation or system.

Use it to:

bring stakeholders and partners together to assess priorities for NHS-industry partnership working

design and implement partnership projects aligned to strategic objectives and informed by the guidance resources

strengthen assurance and nurture the culture of effective partnership working

scale existing partnerships across care settings.

Stage 1

Project identification and scoping

Key activities

- **Identify unmet need:** Healthcare organisations and industry partners identify unmet needs to support improved clinical outcomes and explore how collaborative working and joint working projects can assist. This process includes community engagement and patient feedback to identify opportunities for improvement.
- **Assess scope:** Undertake assessment of the project scope and aims to help identify whether a project is a collaborative or joint working project.
- **Agree objectives and timescale:** Outline the project's purpose, objectives, resource impact and timelines – to be approved by parties to enable progression to Stage 2, the project setup stage.

Resources and templates

- [Scoping decision guide](#)
- [Checklist for collaborative/joint working](#)
- [Project concept framework](#)

Stage 2

Project setup and governance structures

Key activities

- **Form project team:** Project team or steering committee is formed.
- **Build trust:** Work undertaken to engender trust and ethos of effective partnership working.
- **Develop project initiation document (PID):** Develop and approve a project initiation document (PID) that details the aims and objectives of the project, expected outcomes, project completion date, exit strategy, project organisational structure, resources as well as data and patient protection.
- **Governance frameworks:** Establish project governance arrangements.
- **Engage with stakeholders:** Undertake stakeholder engagement relevant to the project setup.
- **Certify PID:** PID developed and agreed with the healthcare organisation, project team, governance committee and industry partner respectively. It should then be certified by the industry partner.
- **Publish executive summary:** An executive summary of the project rationale, period, objectives, roles and responsibilities of the parties, and financial arrangements to be published on the industry partners website before arrangements are implemented. It should be certified by the industry partner.

Resources and templates

- [Project team/steering committee members](#)
- [Steps to build trust](#)
- [Project initiation document](#)
- [Establishing a robust governance framework](#)
- [Stakeholder and patient engagement](#)
- [Executive summary template](#)

Stage 3

Project implementation and outcomes reporting

Key activities

- **Deliver project:** Project delivery and evaluation.
- **Monitor progress:** Project monitoring and regular reporting against outcomes outlined in the PID and within the written agreement. If significant changes to the project occur during implementation, an amendment framework should be completed and agreed by the project team and the governance committee.
- **Publish project outcomes:** All parties should publish outcomes of the project within six months.
- **Disclosure UK:** Transfers of value related to projects must also be disclosed via the Disclosure UK database.

Resources and templates

- [Project monitoring guidance](#)
- [Project amendment framework](#)
- [Summary of project outcomes template](#)