

This list provides guidance on steps necessary in cross-TTC collaboration. It is not all-inclusive and focuses largely on training and technical assistance, but also addresses cross system product development. The list is in chronological order, but all items need to be considered in the initial stages of collaboration. This document is a companion piece to the *30 Steps for Delivering Technology Transfer Center Events* document which includes specific examples related to delivering training and technical assistance events in the TTC Network.

|  |  |  |
| --- | --- | --- |
|  | Status | Decisions |
| Shared Commitment and Trust | | |
| 1. Identify a clear topic based on cross-center needs. | Choose an item. |  |
| 1. Identify learning outcomes. | Choose an item. |  |
| 1. Clear identification of collaborators (decide which logos will be used in marketing). Refer to Cross-System Collaborations Document. | Choose an item. |  |
| 1. Agreement if additional collaborators can be added and, if so, the process for inclusion. | Choose an item. |  |
| 1. Develop a timeline of activities and who is responsible for each. | Choose an item. |  |
| Agreement on Internal Communications | | |
| 1. Agree on a program management process to ensure all have access to materials during and following the collaboration (drop box, google doc, basecamp, one drive, etc.). | Choose an item. |  |
| 1. Align staff from each TTC willing to contribute to ensure fairness. | Choose an item. |  |
| 1. Ensure a commitment exists to attend frequent meetings as a priority for effort to move forward. Weekly meetings may be necessary to keep things moving forward. | Choose an item. |  |
| Shared Agreement on Format and Method of Delivery | | |
| 1. Method of delivery can range from live, to self-paced asynchronous products, to a written product with a host of additional options. Some examples include: • A webinar series; • Establishing communities of practice; • An ECHO series; • Chat rooms; • A lecture; • Specific consultation; • A white paper; • A program assessment or program evaluation; • A self-paced course through HealtheKnowledge; | Choose an item. |  |
| 1. Ensure learning outcomes are aligned with the method of delivery. | Choose an item. |  |
| 1. Agreement on which (if any) continuing education units will be offered. | Choose an item. |  |
| * If so, determine who will pay for applications. | Choose an item. |  |
| * If so, determine who will complete the forms. | Choose an item. |  |
| Commitment for Sharing Expertise and Evidence-Based Practices | | |
| 1. Content will be based on evidence-based practices. | Choose an item. |  |
| 1. Identify experts in-house, or external to the organization, to deliver content in the format designated.  * All collaborators should contribute expertise or pay consultation fees for expertise. * If it is an ECHO series, there is shared responsibility for locating hub team members, meeting facilitator(s), and finding practitioners to present cases. There must also be agreement on fidelity to the ECHO model (ensuring case presentations). | Choose an item. |  |
| 1. If it is a product, determine who will design, brand, provide content, edit, and all those who need to review and give final approval before dissemination. | Choose an item. |  |
| Shared Agreement on Evaluation/Engagement on Knowledge about Outcomes | | |
| 1. GPRAs – need to determine how they will be shared. If the event is a collaboration within the same TTC network or across TTC networks consider using the shared GPRA form and process. Within network events are shared based on participant Zip code. Cross network sessions split total GPRAs 50/50 between the two TTC networks. | Choose an item. |  |
| 1. If additional evaluation or assessment is planned, discuss IRB approvals, methodological approach, informed consent, scales, data analysis, the evaluation process, where the outcome data will be stored and strategies for data sharing. Determine who will author and who will brand. | Choose an item. |  |
| 1. If developing communities of practice, you need to determine who will continue ongoing communications using the online platform. | Choose an item. |  |
| External Communications | | |
| 1. Ensure you market the training, event, product, etc., consistently across the network with one person to run point. Ensure all collaborators have a person identified to provide input and final permission to release marketing materials. | Choose an item. |  |
| • All TTCs should forward their marketing materials independently in their network using their electronic mailing lists or personal outreach if appropriate. | Choose an item. |  |
| • Brand standards should be followed and logos from all contributing centers should be included. | Choose an item. |  |
| • Agree who will develop social media posts and guides for other TTCs to share and be sure to promote the training using the same language, hashtags, and handles. | Choose an item. |  |
| • One person should develop the images for the social media posts. | Choose an item. |  |
| • Request presenter(s)/trainer(s) to share their social media handles (their personal handles and those of their organization/association) that can be tagged in posts. | Choose an item. |  |
| • Determine who may have time to live Tweet if a live event. | Choose an item. |  |
| • Determine process to roll out shared products. | Choose an item. |  |
| • Commitment to tag ALL TTCs that are involved in the training in each post. Be specific about the collaboration. | Choose an item. |  |
| Participant Registration Process | | |
| 1. Determine point person to handle the registration.   Review **30 Steps for Delivering Training in the Technology Transfer Center Network** for additional guidance and sample documents. | Choose an item. |  |
| • If it is a live event, help ensure the event can be easily added to electronic calendars. | Choose an item. |  |
| • Explain technology access required by participants in communications. | Choose an item. |  |
| • Provide update on registration to trainers and TTC Directors/Program Managers. | Choose an item. |  |
| • If there will be a Q&A section in the registration link that should be shared and used to prepare information. | Choose an item. |  |
| • The identified point person must let registrants know the attendee expectations. If the focus is developing communities of practice, you need to provide as much information up front as possible (this includes dates, time commitments, and training requirements). | Choose an item. |  |
| Session/Product Readiness | | |
| 1. Identify a person (and possibly a back-up as well) who will run point on technology. They will invite panelists, hub team members, and content experts if it is an ECHO session. They will be responsible for arranging and testing the technology prior to the event and running any tech during the training. | Choose an item. |  |
| • Test run with presenters and others. Provide training on model of delivery if it is necessary (for example, training presenters on the ECHO model). | Choose an item. |  |
| • For live/online training, ensure back-ups and redundancies exist for unplanned issues. | Choose an item. |  |
| • If it is a product, secure input by end users prior to marketing and distributing. | Choose an item. |  |
| • Set a date and agree on when content will be forwarded by presenters to ensure 508 compliance. | Choose an item. |  |
| • Consult with Heather Gotham about the topic, and then work with Erin Hobbs and others if this is a HealtheKnowledge product and use their checklists to ensure content is correctly formatted for the HealtheKnowledge platform. | Choose an item. |  |
| Specific Session Content | | |
| 1. Presenter slides with TTC branding. The slides should include: | Choose an item. |  |
| • Name of the presenters. | Choose an item. |  |
| • SAMHSA and TTC Disclaimer. | Choose an item. |  |
| • Information about TTC sponsors. | Choose an item. |  |
| • Housekeeping rules and session | Choose an item. |  |
| • Develop a session script, and agreed upon description for introducing the collaboration and the centers to ensure smooth transitions and clear recordings. | Choose an item. |  |
| 1. Ensure there is a bio-sketch for authors and contributors. | Choose an item. |  |
| 1. Starting sessions: | Choose an item. |  |
| • Explain technology and content. | Choose an item. |  |
| • Ensure good sound quality and respond to technology questions. | Choose an item. |  |
| • Open with a poll (if HealtheKnowledge a pre-test) to engage participants and to assist in encouraging them to be at their screens. | Choose an item. |  |
| • Technology point person provides housekeeping rules (video, mute, question and answers, chat box) and highlights the attendee expectations to ensure participants know if their video needs to be open prior to event. | Choose an item. |  |
| • If it is a live session, provide content in the chat box or respond to question and answers and agree on an approach as a group. | Choose an item. |  |
| • Publicize TTCs, their websites, and network resources. | Choose an item. |  |
| 1. If hosting a large, live session, plan who will respond to each question. You may want a second or third trainer to help respond. | Choose an item. |  |
| • Share the question and response log with everyone following the session. | Choose an item. |  |
| • Suggest keeping the chat box open to encourage participation at all levels. | Choose an item. |  |
| Post Session Tasks | | |
| 1. Designate a point person to forward certificates of attendance (CEUs) for participants. | Choose an item. |  |
| • Ensure attendance, appropriate branding, and electronic signatures by directors. | Choose an item. |  |
| • Follow up on tasks related to CEUs, if appropriate. | Choose an item. |  |
| 1. The person handling registration will provide a follow-up email to participants with slides, recording of presentations, point person to reach out to for certificate questions, and information on future sessions. Develop as much as possible before the session and send as quickly as possible after session occurs. | Choose an item. |  |
| 1. Agree where recording will be posted and the language for the archive. | Choose an item. |  |
| 1. Agree who will serve as corresponding author on products. | Choose an item. |  |
| Engage in De-Briefing Following Sessions | | |
| 1. Examine what worked and what did not work and maintain ongoing cross-TTC communication. | Choose an item. |  |
| • Agree on next steps and the language relative to deliverables in the continuation agreement and annual reports. | Choose an item. |  |
| 1. **KEEP MEETING**. You can’t anticipate every problem. | Choose an item. |  |



**Authors and Contact**

**Co-Author**

**Thomasine Heitkamp, LCSW**

Co-Director

Mountain Plains Mental Health Technology Transfer Center

[thomasine.heitkamp@und.edu](mailto:thomasine.heitkamp@und.edu)

**Co-Author**

**David Terry, BA**

Program Manager

Mountain Plains Mental Health Technology Transfer Center

[david.v.terry@und.edu](mailto:david.v.terry@und.edu)

**Editor and Contributor**

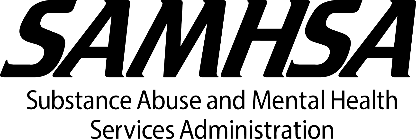
**Shawnda Schroeder, PhD**

Co-Director

Mountain Plains Mental Health Technology Transfer Center

[shawnda.schroeder@und.edu](mailto:shawnda.schroeder@und.edu)

Adapted from Heitkamp, T. (2019, April). *30 Steps for Cross System Collaboration Specific to Technology Transfer Centers*. Mountain Plains MHTTC.



This publication was prepared for the Mountain Plains Mental Health Technology Transfer Center (Mountain Plains MHTTC) under a cooperative agreement from the Substance Abuse and Mental Health Services Administration (SAMHSA). All material appearing in this publication, except that taken directly from copyrighted sources, is in the public domain and may be reproduced or copied without permission from SAMHSA or the authors. Citation of the source is appreciated. Do not reproduce or distribute this publication for a fee without specific, written authorization from the Mountain Plains MHTTC. For more information on obtaining copies of this publication please call 701-777-6367.

At the time of this publication, Miriam Delphin-Rittmon served as Assistant Secretary for Mental Health and Substance Use and Administrator of SAMHSA. The opinions expressed herein are the views of Thomasine Heitkamp, David Terry, and Shawnda Schroder and do not reflect the official position of the Department of Health and Human Services (DHHS), or SAMHSA. No official support or endorsement of DHHS, SAMHSA, for the opinions described in this publication is intended or should be inferred.

​The work of the Mountain Plains MHTTC is supported by grant H79SM081792 from the Department of Health and Human Services, Substance Abuse and Mental Health Services Administration.