# INTERPROFESSIONAL EDUCATION:

## A Patient-Centric Approach to Teaching Healthcare Professionals

Steffens Scleroderma Foundation

*Breaking the Chains*

# Interprofessional Education:
## A Patient-Centric Approach to Teaching Healthcare Professionals

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## Foreword

Have you gone to a physician's office and been faced with a blank, puzzled stare after your examination and conversation about your physical state and symptoms? Have you experienced visits to multiple physicians and traveled to different states before receiving a valid diagnosis? Has this process taken two, three, or seven years before a diagnosis is reached? This is often the case for people living with scleroderma and other rare diseases. This period of "not-knowing" can be isolating, stressful, harmful physically and mentally, and allow irreversible organ damage to occur.

When we joined the Board of Directors of the Steffens Scleroderma Research Foundation, our initial focus was on finding ways to fulfill the mission of the Foundation: foster research, improve disease awareness and understanding especially among healthcare professionals, and collaborate both nationally and internationally. Because of our strong desire to reduce the time to patient diagnosis and correspondingly improve patient quality of care and life, we chose to focus on disease education and awareness.

As Board members, we were seeking approaches that would make a meaningful impact. We realized that health care professionals – physicians, pharmacists, nurses, physical therapists, nutritionists, occupational therapists, psychologists – were the key to increasing scleroderma awareness. The saying "being in the right place at the right time" was appropriate when we were invited to attend an Interprofessional Education (IPE) event on amyotrophic lateral sclerosis (ALS) in the Fall of 2017. Following the ALS-IPE, we were very excited about the idea of applying the IPE approach to scleroderma, and shifting the IPE focus to a patient-centric model, with patients as both participants and teachers to healthcare students.

Working collaboratively with Russell Sage College (Professor Barbara Thompson) and Albany College of Pharmacy and Health Sciences (Professor Jeffrey Brewer), our first highly successful Scleroderma IPE event was held in the Spring of 2018 with over 200 students and 30 scleroderma patients attending. After five partnered IPEs, over 1,000 healthcare students from eight different disciplines are now "Scleroderma Aware".

A patient's personal story illustrates the success of the scleroderma IPE. A female scleroderma patient had an appointment with a new physical therapist (PT), expecting to introduce scleroderma to the PT. To her amazement, the PT knew about the disease and how to help her. Both were further amazed that patient and PT had been prior participants in the Scleroderma IPE.

A student interviewed after a Scleroderma IPE event stated: "You can read about this sort of thing in a book, you can learn about it from a lecture in class, but to actually hear first-hand experiences, to see the patient differences and similarities, that to me is what really brings what I should learn for the future in identifying scleroderma in my own practice."

This eBook was authored to serve as a building block and a base of prior experience to help expand and establish successful Scleroderma IPEs nationally and internationally.

***Linda Meenan and Peter Meenan, PhD***
***Board Members, Ann Steffens Research Foundation***
***June, 2022***

ALBANY MEDICAL COLLEGE

November, 2021

I have been involved in the care of individuals with scleroderma for more than 40 years and currently serve as professor of medicine and director of the Scleroderma Clinic at Albany Medical College, Chief Medical Officer of the Steffens Scleroderma Foundation, and 30-year member of the medical advisory board of the Scleroderma Foundation Tri-State. For the past 5 years I have been intimately involved in the creation and evolution of the interprofessional education event in Albany, New York, a collaboration of multiple health professional schools and of our research foundation.

I am only too aware of how the care of individuals with scleroderma suffers from low public awareness and limited familiarity with the disease among most medical professionals. Scleroderma is a systemic rather than an organ-specific disease. Individuals may present with symptoms that lead them to urgent care centers, dermatologists, gastroenterologists, pulmonologists, cardiologists, rheumatologists, or their primary care providers. Misdiagnosis is common. Delay in initiation of appropriate care is common, which can have terrible consequences because of the potential for the rapid and disabling loss of hand function and the life-shortening effects of neglected lung, heart, and kidney disease. Scleroderma is listed among "rare diseases" but it is one of the most common of them with an estimated 300,000 afflicted with some form of this disease. Sooner or later, just about every physician and every health care provider will encounter someone with scleroderma, but, at present, many will not recognize the presence of the disease.

A patient-centric interprofessional education program can do a great deal to increase awareness of the disease by helping to deepen the knowledge base of healthcare providers and health professional students. Patient narratives can be impactful, memorable and motivating in a way few lectures can. To be an educator and to be recognized as the expert on the lived experience of the disease can be remarkably empowering and fulfilling to the patient participants. The program developed through the partnership of the Steffens Foundation, Russell Sage College and Albany College of Pharmacy provides a useful model that can be replicated at the 50 other scleroderma centers nationwide. It can also be offered to medical schools and medical centers which do not yet have scleroderma centers, but which certainly do already have patients with scleroderma.

I hope that you will share my passion for improving the care and the lives of individuals with scleroderma, not just on a case-by-case basis, but by making scleroderma a more familiar word to all of us, and by making healthcare providers more equipped to recognize and manage the disease.

Sincerely,

Lee Shapiro

***Lee Shapiro, MD***
***Professor of Medicine and Director of Scleroderma Clinic, Albany Medical College***
***Chief Medical Officer, Steffens Scleroderma Foundation***

# What is Interprofessional Education (IPE)?

## According to the World Health Organization (WHO)*,

> "Interprofessional education occurs when students from two or more professions learn *about*, *from*, and *with* each other to enable effective collaboration and improve health outcomes.
>
> Interprofessional education is a necessary step in preparing a "collaborative practice-ready" health workforce that is better prepared to respond to local health needs.
>
> A collaborative practice-ready health worker is someone who has learned how to work in an interprofessional team and is competent to do so.
>
> Collaborative practice happens when multiple health workers from different professional backgrounds work together with patients, families, carers and communities to deliver the highest quality of care. It allows health workers to engage any individual whose skills can help achieve local health goals."

*Reference:
https://www.who.int/publications/i/item/framework-for-action-on-interprofessional-education-collaborative-practice

Once students understand how to work inter-professionally, they are ready to enter the workplace as members of a collaborative practice team. This is a key step in moving health systems from siloed, inefficient care to a partnership model that results in better outcomes. For patients with scleroderma, this is especially important, as it will take a team of healthcare experts to meet their varied needs.

Interprofessional education is now a graduation requirement for many students in the areas of healthcare sciences. As such, most professional institutions will already offer some sort of IPE programs. It is our goal to create a streamlined program that can be implemented for any disease-centered community.

# How to Use this Book

This eBook is designed as a guide to help you create your own interprofessional education program (IPE). It illustrates the "best practices" developed over a period of several years. However, it is not meant to be a step-by-step tutorial and does not imply that there is only one way to lead a successful IPE program for healthcare students. We hope that you will both honor the critical components of an IPE (Patient-Centric Approach and Partnerships), and discover your own best practices. Furthermore, we hope that you will pay these lessons forward and share any knowledge you gain through your experience with us and others who will find them useful.

Thank you for joining us on this journey…

# Background & Overview

The sections below provide a background and overview of the **Steffens Scleroderma Interprofessional Education program**, (which will be referred to from now on as **Steffens SCL-IPE**). Each of the components of the IPE will be further explored throughout this guide.

## About The Ann Steffens Scleroderma Research Foundation

The Ann Steffens Scleroderma Research Foundation (https://www.steffens-scleroderma.org/) (Steffens Foundation) was founded in 2010 with the goal of helping those afflicted with scleroderma and promoting research. The Steffens Foundation was launched from a generous donation made by Helen Polenz, in honor of her daughter, Ann Steffens, who died due to complications from scleroderma. Steffens Foundation's mission is to:

- Support and promote research toward treatment and cure of scleroderma, Degos disease, and other related disorders
- Promote awareness and understanding of these disorders, especially among healthcare professionals
- Encourage collaborative efforts, nationally and internationally, aimed at realizing these goals

Steffens' areas of focus (research, awareness, and collaboration) all work toward the ultimate objectives of expediting diagnosis and improving the patient experience.

## Steffens Scleroderma Interprofessional Education Program

The **Steffens SCL-IPE** is a three-hour forum combining guided discussion, lecture and skill demonstration. By attending this program, students receive academic credit and fulfill a portion of their IPE requirements. The program's design of "instruction and modeling" followed by "practice" helps to cultivate confidence and engagement in learners. Student participants benefit from the opportunity to ask questions and learn from each other, gaining diverse perspectives from other fields in healthcare.

A defining attribute of the **Steffens SCL-IPE** is the inclusion of patients as leaders and educators. Each year, 30 people living with scleroderma and a few caregivers, participate in the IPE program as "patient educators." In this "roundtable discussion" forum, patients share their journeys and provide key insights into this complex disease. Feedback from the participating patients has been overwhelmingly positive – many citing the significance of being able to assist in the education of future healthcare professionals. They have found the experience to be empowering, allowing them to build their confidence and strengthen their self-image.

The program agenda concludes with a multi-disciplinary panel of allied diverse health professionals with significant expertise in scleroderma care and research who address student questions from varying perspectives.

The **Steffens SCL-IPE** contains a number of supporting elements. For example, a nutrition table has been provided at in-person events, representing the often complex dietary needs of people living with scleroderma resulting from the GI and digestive manifestations of the disease. Supplemental educational resources and study materials are provided (e.g.videos and online research) in preparation for, and to reference during the event. Follow-up surveys provide insight into the IPE's effectiveness, and serve the EAC's goals of quality assurance and continuous improvement. See section 5 below for a full list of supporting elements.

This novel approach to patient-centric interprofessional education empowers people with scleroderma to share their personal stories and lived experiences to educate future healthcare professionals. Consequently, students report a better understanding of how scleroderma affects peoples' daily lives, and the importance of customized interprofessional case management to improving patient care. Students also appreciate a greater understanding of the role each member of a healthcare team plays.  Relationship building is emphasized as a critical component of providing patient-centric care.

While the **Steffens SCL-IPE's** focus is on scleroderma, the skills and approach are equally relevant to, and could easily be modified for other chronic multi-organ/system conditions.

## Program History

In 2016, leaders of the Steffens Foundation began researching ways to promote understanding of scleroderma among healthcare professionals by interviewing others involved in rare disease awareness programs. Interprofessional education was identified as an ideal way of creating a cadre of scleroderma-aware healthcare professionals in the greater Albany, NY area. Like many systemic diseases, scleroderma may impact multiple organ systems, and as such the associated presentation and symptoms are often highly individualized. Patients often encounter an overwhelming series of specialists and require well-coordinated and effective care. Steffens' leaders believed that the inclusion of scleroderma patients in an interprofessional education program would provide a much deeper and more impactful learning experience for healthcare professionals involved in the care of these patients. These patient-educators are quite often effective communicators, well-informed about their disease, and highly engaged with the community through a number of associations and online support groups.

By leveraging an existing relationship and established IPE program between Russell Sage College and the Albany College of Pharmacy & Health Sciences (ACPHS), Steffens board members and its academic partners were able to launch the first patient-centric Scleroderma IPE program in 2018. As of 2022, there have been five **Steffens SCL-IPE** offerings to date, in which collectively over 1,000 students from 8 disciplines have participated. In recent years our program has grown to include a small number of students from Albany Medical College, University of Albany, SUNY School of Public Health, and other schools who have participated in the **Steffens SCL-IPE**. Students' healthcare specialties have included:

- Pharmacy
- Nursing
- Nutrition
- Physical Therapy
- Occupational Therapy
- Psychology
- Public Health
- Medicine

The **Steffens SCL-IPE** is made possible by the strong collaboration between the Steffens Scleroderma Foundation and its educational partners, the Russell Sage College and ACPHS, both of which are highly involved in the IPE's design and execution. Expanding the **Steffens SCL-IPE** means increasing participation from medical schools and broadening engagement to include other professional education programs such as dental, wound care, speech therapy and respiratory therapy.

The Steffens Foundation's Education & Awareness Committee (EAC) was formally established in 2018. One of its primary goals is to ensure the continuation and growth of the IPE with an eye toward replicating the program at other scleroderma centers. The EAC continues to play a leadership role in the design and execution of the **Steffens SCL-IPE**, in close partnership with the IPE leaders from ACPHS and Russell Sage College, and the Scleroderma Clinic at Albany Medical Center.

## Impact of the Program

While a longitudinal study will hopefully be conducted to assess the long-term benefits of this unique approach to interprofessional education, there has already been anecdotal evidence of impact through patient/provider interactions. In addition, the IPE has inspired a number of students to delve further into scleroderma research and intervention.

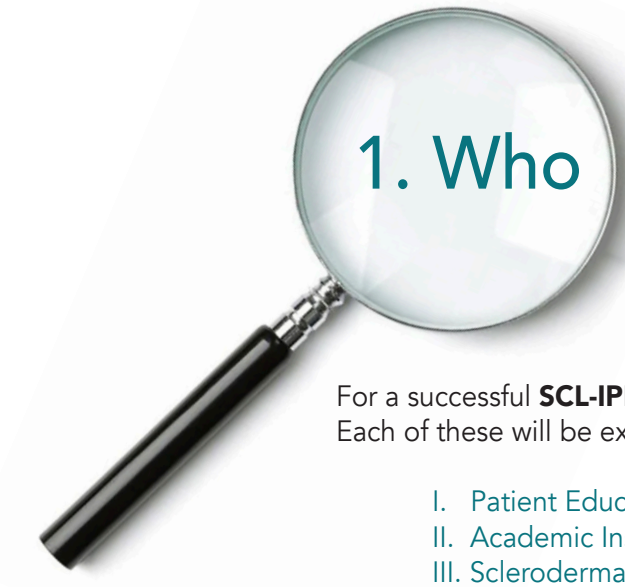
## Virtual Program

In 2021 and 2022 due to COVID-19 restrictions, the **Steffens SCL-IPE** program was delivered virtually using Zoom video conferencing. The virtual IPE had several benefits:

- The format was well-received and easy to use for most
- Met all of the IPE program goals
- Provided an opportunity to include participants outside of the Albany, NY area

Group roundtable discussions were conducted using online breakout rooms. Supporting elements, such as programs, recipes and study materials were delivered electronically. The online platform opens a number of possibilities for future IPE programs due to its increased accessibility and ability to deliver a combination of both synchronous and asynchronous elements. A hybrid IPE model may emerge, allowing the inclusion of students and patients from geographical areas without nearby IPE programs.

# Creating a Scleroderma Interprofessional Education Program



## 1. Who is Involved in the **SCL-IPE**?

For a successful **SCL-IPE** program, three core constituencies should be represented. Each of these will be explored in greater detail in the following section.

I. Patient Educators
II. Academic Institutions
III. Scleroderma-Focused Organization(s): (Clinic, Foundation or other Professional Support Resources)

## I. Patient Educators

Core to the design of the **SCL-IPE** is the participation of people living with scleroderma, who serve as educators by engaging healthcare students in small group (roundtable) discussions.

Through small group question and answer sessions, patients relate their stories living with scleroderma and touch upon early symptoms, diagnosis, daily challenges, organs affected, healthcare collaboration needs, medication issues, and tribulations associated with disease understanding. The patients each offer a unique and compelling perspective on the evolution of their disease, the path to and trauma of the diagnosis, and uncertainties regarding prognosis. They may also share the impact living with scleroderma has on occupational and self-care functions, along with their social and home life. Additionally, patients provide insight into the challenges associated with experiencing a disease which may alter their physical appearance, and diminish dexterity and flexibility. Treatment of scleroderma often requires consultations with multiple specialists, as well as undergoing many medical procedures, and the prescription of multiple medications. Each patient can offer his or her experience coping with a wide variety of miscommunications and frustrations as healthcare consumers. Patients often describe the constant need to be an educator to those around them, including to many practicing healthcare providers, who know very little, if anything, about scleroderma. By participating in the **Steffens SCL-IPE**, patients have the opportunity to make a difference by educating future healthcare professionals.

**Steffens Tip:** When designing your IPE, be sure to incorporate patients from the start. Complete inclusion of patient educators throughout the process, from planning, preparation and execution of the IPE, will foster a greater sense of engagement and empowerment. In addition, ensure that patients are in attendance and engaged throughout the full program rather than for only their specialized portion alone, and allow more opportunities for patient and student interaction.

## How many patients will we need?

Success of the **SCL-IPE** requires the involvement of a sufficient number of individuals with scleroderma to allow for a small group of students to be paired with a patient in order to facilitate a more collaborative and interactive environment. The ideal small group ratio is **one patient for every 6 - 8 students.**

**Steffens Tip:** In the **Steffens SCL-IPE**, there are typically 30 patients and 200 students, creating a ratio of approximately 6 students per patient.

## Are caregivers included?

It is useful to have caregivers attend the **SCL-IPE** on behalf of- or with patients. Often we only see two sides to this disease: that of the patient's and of the specialist/medical professional, but caregivers are able to offer a unique third perspective. By providing ongoing support, caregivers are able to observe the emotional, physical, and social impact of the disease. They can give unique insight into the toll this disease takes on loved ones, which is very important when dealing with an intricate, multifaceted disease such as scleroderma. Caregivers offer a look into what day-to-day assistance is needed and how crucial support is for individuals living with scleroderma. In sharing their perspective with students at the IPE, caregivers provide a look at the disease from a different angle.

## What skills are required for the scleroderma patient participants?

Like many people with rare diseases, people with scleroderma often become disease experts out of necessity. We have found that many patients are extremely literate about scleroderma, and are able to well-articulate their journeys. That being said, there are some skills that will come in handy during an IPE. These include:

- Speaking comfortably and honestly regarding the struggles of their journey
- Preparation and knowledge of scleroderma
- Courteous communication skills, such as active listening, time management and summarizing
- Desire to learn

While most participating patients feel confident with a few of these skills, not everyone will feel equally comfortable with all of these skills. The key is for patients to be well-prepared and oriented to the program ahead of time.

Most importantly, the patient should feel comfortable and willing to communicate and share their individual experiences with students. Since this is a patient-centric IPE, the patient should understand and appreciate their role as an educator, and recognize that learning is greatly enhanced with more detailed examples of their personal experience. Patients should be willing to commit to the time and effort needed for preparation (including training) and participation in the IPE event.

**Steffens Tip:** In 2022, patients participating in the **Steffens SCL-IPE** attended a virtual program titled "**The Art of Advocacy**" to provide patients with a more detailed overview of the program and the expectations associated with being a patient educator. For more details on this program, see **Section 5.IX**.

## What's in it for the participating patients?

While the patients are primarily attending the **SCL-IPE** as educators, there are numerous benefits to being a participant, such as:

- Empowerment, a boost of self-confidence and reduced anxiety that comes with being able to share one's journey
- Sharing their story to healthcare professionals that are actively listening, and who appreciate their struggles and hardships
- Deepening knowledge of future healthcare professionals and raising awareness of this little-understood disease, thereby potentially enabling earlier diagnosis, and sparking interest in future research and studies towards a cure
- Greater insight into the various healthcare specialties and how they may assist them in their own quality of care

### How are patients recruited for the IPE?

This is where partnerships with scleroderma focused organizations such as clinics, foundations and patient support groups can be critical. These will be your best resources for recruiting patient educators. Working with local healthcare providers outside clinics may also be a useful source.

Public patient-related educational events such as conferences can also be used to share information about and opportunities for the IPE event. A list of organizations and scleroderma clinics is available on the National Scleroderma Foundation website (scleroderma.org). Past participants may also be a key resource for recruitment, as most who participate in one **SCL-IPE** will be likely to continue to do so.

Some specific approaches for recruitment may include:

- Creating brochures and posters to display or distribute in healthcare offices/clinics
- Presenting at support and affinity group meetings
- Posting about the program on social media - there are a number of scleroderma-focused groups on Facebook, for example
- Word of mouth (leveraging patients' personal networks)

Offering the program virtually may enable recruitment of patients who in the past were hesitant to commit because of distance, or concerns about travel in darkness or exposure to cold. The virtual format greatly increases the pool of potential patient participants, though some may be hesitant if they are not comfortable with technology.

**Steffens Tip:** In creating a recruitment strategy, it is important to be clear in terms of the expectations and benefits. In our experience, when informed of the purpose and nature of the program, patients almost uniformly expressed interest in participation, though disease progression or other acute illness compelled some to decline.
See **Appendix 1: Sample Patient Solicitation and Response Form**

## II. Academic Institutions

The following fields of study are all relevant for a scleroderma IPE program. Though most of these will be at the graduate level, programs may incorporate a variety of academic levels in the IPE:

- Nutrition
- Nursing
- Occupational Therapy
- Pharmacy
- Physical Therapy
- Psychology, Social Work
- Public Health
- Medicine
- Dental

Interprofessional education is now a graduation requirement for many students in the areas of healthcare sciences. As such, most professional institutions will already offer some sort of IPE program. Adapting an existing program rather than creating something from scratch may assist in establishing a partnership with an academic institution. Ideally, a partnering academic institution involved should have an interdisciplinary IPE committee. Committee members will contribute to the development of the event plan and program structure.

**Steffens Tip:** For the **Steffens SCL-IPE**, members of the IPE Committee from our academic partners collaborate with the Steffens Education Awareness Committee (EAC) to plan and execute the event, ensuring the needs of all parties (academic institutions, scleroderma foundation and scleroderma clinic) are met. Each group has specific tasks associated with planning the event, some of which may overlap. All project leaders involved at the schools, foundation and clinic remain in contact throughout the planning process to ensure all necessary tasks are fulfilled. Task lists are included in **Appendix 2: Detailed EAC Task List** and **Appendix 3: Partnering Colleges Task List and Considerations for In-person and Virtual SCL-IPE**, but note that lists will change based on the program format, mode of delivery, and size of the event.

### How do you engage Academic Institutions?

## Do your research! It is all about relationships and commitment to the idea.

Basic rule of thumb is to start with existing relationships if you have any. Any connection within an academic institution should be able to point you to someone within the disciplines you are trying to target.

If you do not have any connections, or your connections cannot point you in the right direction, look to see if your local universities have an IPE department, division or curricular plan. Pharmacy schools or others with health disciplines (such as those listed above) are a good place to start, since accredited programs will have competencies around Interprofessional Education that must be attained.

Here are four potential avenues to begin a relationship with an academic institution:

**1. Website:** Search a college website for "IPE" or "Interprofessional Education". This will often lead to specific IPE programs and provide the names of the Program Directors or other related faculty and staff.

**2. Administration:** Go to the website and search out job titles that will be responsible for academic programs like any title that includes "academic affairs" or "professional affairs". These will be the administrators who can get you in direct contact with those in their college who are responsible for building Interprofessional Education programs and collaboratives.

**3. Faculty:** IPE events best live within courses to incentivize students with credit hours and grades. Students have to prioritize their time and this is most often centered around grades and credits. Finding faculty who are passionate about interprofessional education, and open to new approaches, is an important step to making the right connection.

**4. Students:** Many schools have a co-curricular requirement and students establish clubs and professional organizations around this area to augment their learning. Any student on rotation in their last couple of years or volunteering at your foundation could also be a driving force to unlocking the best connection for your IPE.

See: **Appendix 3: Partnering Colleges Task List and Considerations for In-person and Virtual SCL-IPE** and **Appendix 4: Partnering Colleges Interprofessional Education Learning Objectives in the Context of Patients Living with Scleroderma**

## III. Scleroderma-Focused Organization(s): (Clinic, Foundation or other Professional Support Resources)

A scleroderma clinic or research center may be the medical home of many individuals with scleroderma, some of whom have been receiving scleroderma-related care from the same physician over a period of years. Individuals from this clinic will constitute the bulk of the patient participants in any **SCL-IPE**. At recent count, there are approximately 60 scleroderma centers in the US. Here is a list maintained by the National Scleroderma Foundation: https://scleroderma.org/find-a-treatment-center

As mentioned earlier, a scleroderma foundation or other patient-focused organization may facilitate patient recruitment. They may also provide details needed for patient involvement, and provide support for any and all needs of the participating patients pre-, during and post- the **SCL-IPE** event, such as:

- Answering patient questions
- Providing event details
- Responding to concerns raised by patients

The organization may build and maintain a cadre of experienced patient **SCL-IPE** volunteers for successful continuity of the event and assist in supplying speakers and expert panelists.

**Steffens Tip:** At the Steffens Foundation, the EAC has played a critical role in the creation, execution and management of the IPE and maintenance of a patient list. See **Section 2.III** for more details on the role of the IPE Management Team.

# 2. Putting it All Together

## I. The Venue (For an In-Person Event)

Planning for an adequate, safe and comfortable space is important for students, speakers and patients alike. In particular, be sure to consider patient comfort and accommodations that may be necessary, such as room temperature, convenient access to restrooms, wheelchair accessibility, parking options, and adequate signage.

The following components are suggested:

- Stage with podium and a table for panelists
- Comfortable seating for students at round tables that will hold 8 - 10 people
- Long tables and displays for literature, snacks, sponsor info, etc.
- Welcome table for patients with relevant information
- Audiovisual equipment:
    - Microphones for podium, panelists, moderators and select roundtables to ensure quality sound for recording as well as audibility
    - Projector and screen
- Snacks (paying special attention to dietary restrictions) and bottled water
- Adequate and accessible restroom facilities

## II. Scheduling the IPE (For an In-Person Event)

It is important to remember that patients with scleroderma often need to stay indoors during harsh weather conditions. Therefore, if you are scheduling a live in-person event, it would be best to stay away from cold winter months. If the event must be scheduled in the winter, consider a virtual rather than in-person event.

## III. The Role of the IPE Managers

The role of the IPE Manager may be played by any of the three constituencies mentioned above. The IPE Managers must schedule the event, obtain both the physical (location, materials, etc…) and human resources (speakers, patients, moderators), and partner with affiliated organizations to promote the **SCL-IPE**.

**Steffens Tip:** At the **Steffens SCL-IPE**, the leadership role falls primarily to the Steffens Scleroderma Foundation's EAC along with the IPE Committee from our academic partners (ACPHS and Russell Sage College).

Primary responsibilities for the IPE Managers fall into the following categories (in many cases performed in partnership with others):

- Financial: budget, sponsorships, etc.
- Obtain resources: speakers, patients, videographer, etc.
- Logistics: event planning with academic partners, promotion
- Developing the IPE agenda (programming)
- Patient recruitment and scheduling
- Materials: for use and distribution before and during the IPE
- Student preparation (in partnership with Academic Faculty)
- Post-event tasks: recognition, appreciations, measurement/evaluations

**See Appendix 2: Detailed EAC Task List**

## IV. Student Preparation

It is very important that students be well-prepared for the IPE. There are a number of pre-event options for student preparedness.

1. Classroom/Academic Discussions: Preparation for the **SCL-IPE** event should take place between the students and their healthcare instructors prior to the event

2. An assigned video, such as "**Scleroderma, The Truth**", should be required viewing by all participating students before the event (vimeo.com/180825404)

3. A reading list should be distributed including relevant literature on Scleroderma

Advance preparation greatly enhances the quality of student participation in roundtable discussions and thus creates a more meaningful experience for the students and patient participants, alike.

**Steffens Tip:** There are a host of additional relevant videos available on the website: https://www.sclerodermavideo.com, including a playlist called "Scleroderma 101".


***Click to view sclerodermavideo.com***

See **Appendix 5: Steffens-EAC Bibliography for Students & Faculty**

## V. Student Coordinators

To address issues of consistency and participation at the roundtable discussions, consider identifying a student at each table/discussion group to act as a coordinator. Responsibilities could include documenting follow-up questions, recording video in virtual events, and potentially encouraging active and equal student participation.

# 3. The IPE Agenda

The agenda below represents an example model used by the **Steffens SCL-IPE**. Several of the key components will be highlighted in more detail.

I. Welcome & Introduction - Moderator(s)
II. Opening Remarks - Offered by a leader of the planning committee or other influencer
III. Keynote Speaker - Inspirational speech by a patient advocate
IV. Instructional Segment: "On the Art of Interviewing and Importance of Active Listening"
V. Best Practice Demonstration: Simulated Interview
VI. Making Scleroderma Personal: Small Group Interdisciplinary Team/Patient Discussions
VII. Expert Panel Discussion

## I. Moderators

The moderators introduce all aspects of the event as well as any of the participating guest speakers. They also assist with transitions from one part of the event to the next; for example, transitioning from a guest speaker to a round table discussion or virtual breakout room session, as well as triaging any technological glitches that may occur or need problem solving throughout the event.

See **Appendix 6: Virtual IPE Moderator Script**

## II. Opening Remarks

At the **Steffens SCL-IPE**, the Opening Remarks are given by a board member or other leader within the organization. It typically covers the following:

- Primary goals of the partnered Scleroderma Foundation
- The Importance of Interprofessional Education (IPE) and its benefits to Scleroderma patients
- The importance of collaboration across an interdisciplinary team to develop the best solutions for patients
- How to get the most from the IPE experience by:
    - Seeking out knowledge from fellow students outside their professional discipline
    - Being open to new ideas
- Highlight those in attendance by discipline, including the expert panelists, as a great example of collaboration.
- Thank those without whom the event would not be possible

See **Appendix 7: Steffens IPE Foundation Rep Talk**

## III. Keynote Speaker

The primary purpose of the keynote speaker is to impact and motivate the audience, as well as attract their interest in the subject. The keynote speaker for the **SCL-IPE** must get the participants motivated to talk and think about scleroderma and professional collaborative team care. The speaker should be an advocate, be it a patient, caregiver, family member/friend or medical professional. If the speaker is a patient with scleroderma, they should incorporate stories about their own life with the disease so that the audience can identify with their journey.

***Click to watch video keynote of Amy Gietzen, Patient Advocate***

Below is a sample outline and key talking points that a speaker may utilize in their fifteen-minute speech. Note: These talking points are from the perspective of a scleroderma patient as a keynote speaker.

1. **Opening Statement:** A statement or phrase that will grab the attention of the audience and pique their interest. i.e., "In a perfect world scleroderma would already have a cure, in a perfect world COVID-19 would have never happened." The purpose of an opening statement is to ensure you have the audience's attention. The statement must be honest, sometimes alarming, and most importantly lure the audience into your next talking point.

2. **The Topic:** The topic of the speech must always be in accordance with the event's theme. Whether it is interprofessional healthcare and how that impacts scleroderma patients, or how clinicians can work together as a coordinated care team to give scleroderma patients the best care possible to treat the disease. The topic must inform the audience of the purpose of the event and how, as a patient, that topic pertains to your scleroderma journey.

3. **The Personal Journey:** This section involves the speaker's own experiences with scleroderma. A story of their journey that coincides with the event topic and opening statement. Try to bring the audience along with you for a "ride through the life of a scleroderma patient" and all the struggles that come with it. This section needs to be as open and honest as possible to allow students and healthcare professionals to identify with the lives of scleroderma patients. Share how serious this disease is and how important an awareness event is, as a whole to the scleroderma community and to those directly involved with their healthcare.

4. **Closing Statement:** The speaker must summarize all three talking points, and then deliver another impact statement ("We need your help because our lives depend on it!"). The final statement should reiterate why scleroderma awareness for healthcare professionals is so important.

### How do you find a keynote speaker?

Finding a qualified keynote speaker is critical. When searching for a speaker for a scleroderma IPE event you first want to check with your partner organizations to identify potential candidates. You may also reach out to other scleroderma organizations, medical clinics, and support groups.

Here are some key attributes and skills to look for in a keynote speaker:

- **Advocate** - play a role in the greater scleroderma community
- **Articulate** - able to tell their (or describe another's) medical journey in a clear, concise and relatable way
- **Experienced** - versed in public speaking on some level
- **Passionate** - cares deeply about educating people about scleroderma

## IV. Instructional Segment: "On the Art of Interviewing and Importance of Active Listening"

The Steffens IPE has been fortunate enough to have an expert in the field of medical communications to lead this very practical segment on how to ask patients effective questions. This segment helps to prepare students for the upcoming roundtable (or virtual breakout room) discussions with a scleroderma patient.

Basic interviewing and communication skills are highlighted below. These include:

- Use of open-ended questions to allow patients to elaborate and use their own voice
- Asking appropriate follow-up questions
- Avoiding medical jargon
- Observation
- Summarizing patient information

Students are encouraged to show interest in the patients and caregivers being interviewed. The importance of exploring how scleroderma impacts the life of the patient and caregiver should be emphasized. This is followed by a discussion on the importance of active listening, showing empathy and validating concerns and emotions that are revealed during the discussion.


***Click to watch video keynote of Heather Frenz,***
***Director of Simulated Patient Education at Albany Medical Center***

## V. Best Practice Demonstration: Simulated Interview

As a way to enhance the effectiveness of the student/patient roundtable discussions, a simulated interview is conducted for all to see. This interview includes a scleroderma patient who is comfortable speaking in front of the large group, a preselected student volunteer from each specialty to ask questions, and a communications expert who will facilitate the discussion and provide feedback to the students. The Simulated Interview is completed in a pause and reflect format. As each volunteer finishes their brief interview, the communications expert leads a discussion on what was observed, linking it back to the communication and active listening skills that were discussed previously.


***Click to watch Scleroderma Interprofessional Education Interview Simulation video***

## VI. Student/Patient Discussions in Small Groups (Roundtable Discussions)

For the roundtable discussion, participants are divided into small groups. Each group ideally contains one student from each healthcare discipline in attendance, along with a patient and/or knowledgeable caregiver. There can be one or two roundtable experiences where students rotate to another table (or breakout room), and the patient remains at their original table. This second meeting with a different patient helps the students understand how this disease varies from patient to patient. Be sure to allow 40 – 45 minutes for each patient roundtable.

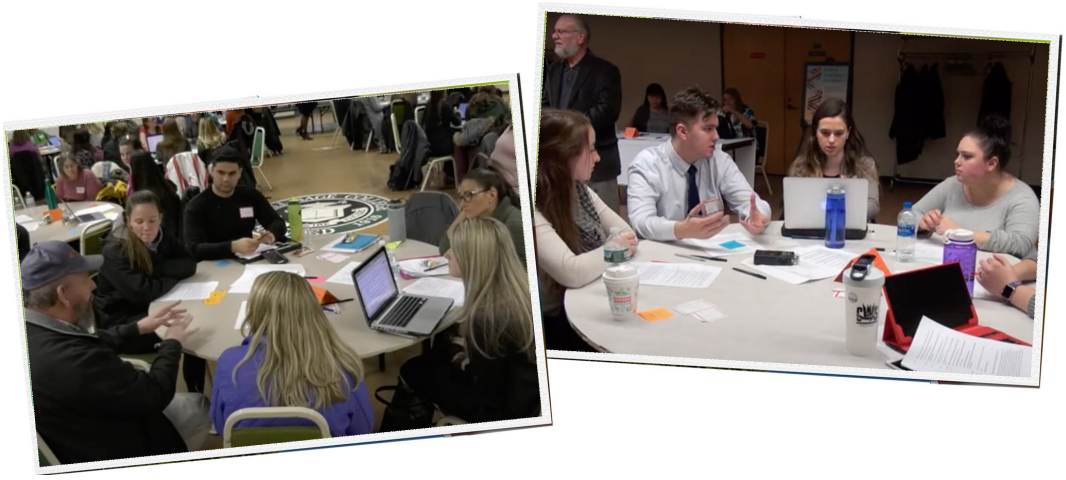
In a typical roundtable session, the scleroderma patient begins by sharing their journey from early symptoms through diagnosis, and highlights the disease impact on their daily lives (e.g. importance of being their own best advocate, medication management, multiple specialist involvement, employment, relationships, frustrations, coping strategies, etc.). During table discussion students receive a first-hand view of the disease's multiplicity of characteristics and debilitating ramifications.

Each student takes turns at the roundtable introducing themselves and relating what their respective disciplines bring to scleroderma patient care. After listening to the patient stories, asking questions and participating in table discussions, students should:

- Realize the power of a collaborative, interdisciplinary, team approach for scleroderma patient care
- Have an increased understanding of scleroderma
- Be aware of the early disease symptoms for future patients thereby aiding in early diagnosis
- Have practiced communication skills of active listing, questioning and observation
- Understand what their discipline can do for scleroderma patients
- Appreciate that patients are valuable and should partner with participants in their health care
- Know that there are different types of scleroderma & that the disease affects the skin, blood vessels and internal organs (GI Tract, heart, lungs, kidneys)
- Be conscious of the complexities of scleroderma as an autoimmune, rheumatic disease creating pain, swelling, stiffness in joints, ligaments, bones, muscles and/or tissues

Some things to consider for the roundtable discussions:

- Define specific goals of the desired outcomes
- Plan your room size for the number of IPE participants and tables involved
- Ensure there are enough patients or caregivers so there is at least one at each table
- Ensure student preparedness through pre-work and faculty discussions
- Designate a facilitator, or train a table attendee to be a facilitator, such as the student coordinator mentioned previously
- Provide table guidelines for interaction and discussion roles
- Set an agenda and time limits
- Provide for an end product if applicable (e.g. At the end of the roundtable discussions, students develop questions related to their discipline, to be answered during the Expert Panel segment.)



## How is this accomplished in a "virtual world"?

Through the use of Zoom breakout rooms, the roundtable experience can be replicated online. There are however a few things to consider:

- Breakout rooms need to be preassigned which requires some work by the Zoom administrator. This also means that they may need to be modified on the fly in the event of last-minute changes. Having a back-up administrator will help greatly in this regard.
- Since this technology may not be familiar to all participants, plan to have prior practice sessions for accessing breakout rooms.
- Record the Zoom session and all breakout rooms for review and evaluation of the session.
- Designate a chat moderator to respond to questions and be sure to save the "chat" to review later.
- Designate one participant in each breakout rooms to start the recording (this will require permissions to be enabled).
- Consider the privacy of those that do not wish to be recorded (both patients and students), and place those who request not to be recorded in a separate breakout room.

## What is the Caregiver's Role in the Roundtable Interviews?

A caregiver could be a person who regularly looks after a scleroderma patient and therefore is scleroderma knowledgeable, and may be a family member, paid independent professional, a friend, or volunteer.

Like the patients themselves, caregivers are able to relate what life is like living with a person with scleroderma. Caregivers also bring a unique perspective, discussing the additional roles they may take on such as:

- **Communicator:** Interacting with healthcare providers and social workers on the behalf of the patient.
- **Navigator:** Understanding the role that each member of the healthcare team plays and how to work or navigate within the healthcare system
- **Advocate:** Addressing all health situations related to the patient's care

Through this interaction, students gain an understanding of how important it is to communicate with family members and caregivers, in addition to the patients, as a means of improving overall patient-care.

## VII. Expert Panel Discussion

Expert panelists are subject matter experts in the field of scleroderma, representing a range of healthcare disciplines. In this segment of the IPE, each panelist will have an opportunity to share their discipline-specific role in the care of individuals with scleroderma. This offers students a deeper understanding of this rare disease, while panelists model an interdisciplinary approach through collaboration, teamwork, and coordination of care. The panel may consist of healthcare providers from among the following disciplines, with additional professionals added as needed:

- **Rheumatology/Medicine**
- **Pharmacy**
- **Nursing**
- **Physical Therapy**
- **Nutrition Science**
- **Occupational Therapy**
- **Social Work/Psychology**
- **Dental**

There are several approaches to structuring the Expert Panel segment of the program. At the conclusion of the Roundtable Discussions, students are asked to come up with questions for the panelists. Having a designated facilitator ask these questions to the panelists will provide a broad perspective and wide range of experiences. Any unanswered questions can be responded to by the expert panel and distributed to students afterwards.

Another option is to provide the panelists with a case study in advance, and ask each panelist to provide a set of responses to a situation presented.

In either scenario, panelists ideally should describe how they may collaborate with other healthcare professionals to provide effective and comprehensive care for the person with scleroderma. Students should take away from the panel the benefits of interprofessional collaboration which will apply not only to persons with scleroderma, but to any number of other healthcare delivery situations.

# 4. Measuring Success

Implementing an effective measurement program is vital to the ongoing success of the IPE. It is important to look at the event from the standpoint of all participants: students, patients, speakers/panelists, organizers and guest observers.

## Why conduct post-event assessments?

Assessments are necessary for continued strengthening of the program. Obtaining quantitative and qualitative evaluations will provide data to:

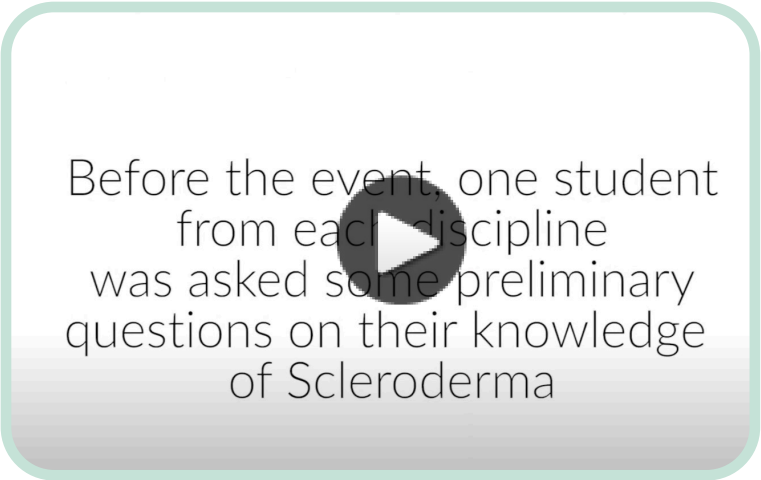
- Determine if event objectives are being met
- Identify areas of strength to be replicated and enhanced in future programs
- Delineate program areas needing elimination or significant changes

**Steffens Tip:** For the **Steffens SCL-IPE**, student surveys are conducted by the academic partners. These surveys collect a combination of demographic, baseline and qualitative data. To increase the percentage of student survey responses, those students who fill out surveys can be provided with certificates of event participation (for inclusion on their resumes) or even gift certificates. A sample student evaluation is attached as **Appendix 8: Russell Sage College IPE Student Survey.**

**Steffens Tip:** Surveys of patients and other participants are collected by the Foundation's EAC. These surveys focus primarily on obtaining qualitative feedback and impressions of the program and generally contain 5 to 10 questions related to event structure and learning objectives.
To see a sample participant survey, go to **Appendix 9: Patient Survey for IPE.**

## How to collect anecdotal feedback?

Immediately following each in-person event, it is an opportune time to conduct a number of one-on-one interviews with patients and other participants. These provide immediate feedback and impressions of the program while it is freshest in the minds of the attendees. If you are able to record these interviews on video, they can even be leveraged for future marketing and fundraising opportunities. It is important, however, to let people know you will be conducting post-event interviews and arranging for some volunteers ahead of time, and obtaining signed releases for any recorded interviews. The videos found below provide some examples of pre- and post-event student interviews.




***Click to watch Pre-Event video***


***Click to watch Post-Event Interview video***

## How do you leverage the feedback you receive?

For the **Steffens SCL-IPE**, assessments have proven invaluable. Favorable program segments have been maintained or enhanced, while those that were less well-received have been modified or removed. Here are a few examples of changes made as a result of feedback:

- Added a second patient roundtable experience to provide additional interaction between students and patients
- Modifications to expert panel and communication skills and mock patient interview were implemented to enhance value
- Alterations to program sequencing and time allotments
- Increased amount of student pre-program preparation
- Addition of the student advocates and patient advocacy training and tip sheet

Some patient-specific changes to live events have also been made as a result of feedback received, including:

- Better access to facilities
- Adjustments to room temperature
- Creation of a patient welcome table
- Seating patients with students for the entire program

# 5. Other IPE Supporting Elements

In addition to all of the core components that make up the essential design of the IPE, we have found that there are a number of peripheral or supporting elements which greatly enhance the experience of the students and patient educators alike. Many of these require some thought and planning to execute effectively.

These include the following, a number of which will be explained in more detail below:

I. IPE Event Program
II. Virtual Event Script
III. Nutrition Table/Refreshments for Students & Patients
IV. Videography & Photography
V. Resource List/Bibliography
VI. Patient "Home Base" & Welcome Table
VII. News & Media
VIII. Zoom & Computer Technical Literacy
IX. Patient Advocacy Training - "The Art of Advocacy"


## I. IPE Event Program

Providing IPE program participants with a printed program (or digital for a virtual event), provides structure and predictability for the event. It also allows the organizers to reinforce the goals and desired outcomes of the program. In addition to including branding elements and information about the program's sponsors, it can be used to recognize donors, volunteers and other important individuals. Programs can also be customized by audience or participant role. For example, a customized program for patients might include additional role-specific guidance and information about available resources.

A sample program from an in-person event is attached as **Appendix 10a: November 4, 2019 Sample Program**, and a sample virtual event program is attached as **Appendix 10b: Scleroderma IPE Program 2022**

## II. Virtual Event Script 2021

A moderator script is developed to ensure the event runs according to the planned program and within proposed timeframes. The script also allows for the moderators to ensure the program includes introductions to each component of the event, as well as guidance for all participants. The script brings the event to life, creating a dialogue between the moderator and the audience. This is especially critical when hosting a virtual event where attendees can become disengaged or distracted easily. See **Appendix 6: Virtual IPE Moderator Script**

## III. Nutrition Table/Refreshments for Students

In preparing refreshments for an in-person IPE event, it is essential to keep in mind the varying needs of those present. In particular, those with scleroderma will often have GI complications which limit the types of food they are able to digest. At the **Steffens SCL-IPE**, dietetic interns who were participating in the program were able to prepare recipes tailored towards common nutrition considerations for those living with scleroderma. Recipes and preparation were overseen and approved by a faculty member to ensure they would meet the needs of those in attendance. The nutrition table also serves to teach students, through sampling, about specific dietary challenges often faced by people with scleroderma.

While there are a number of common GI considerations, it is also important, however, to take into account individual needs. Providing a pre-event survey to those who are scheduled to attend will uncover any personal dietary needs, such as gluten intolerances, vegan, kosher foods, etc. Due to the large volume of food required for 200 - 300 people, donations from local grocery stores might also need to be considered in order to keep costs down. All food should be clearly labeled with ingredients and nutrition facts to prevent any adverse reactions, and participants should leave the event with tangible information (recipes) that they can try at home.

See **Appendix 11: Recipes Nutrition Break Table SCL-IPE**

## IV. Videography & Photography (Live Events)

If you have the ability to do so, we highly recommend having your event recorded by a qualified videographer. There are several benefits to digitally capturing your IPE. These include:

- Ability to review for ongoing process improvement
- Maintaining a complete record of the event
- Creation of marketing materials for potential sponsors and other fundraising
- Measuring success through pre- and post-event interviews, especially with students and patients

Some important considerations:

- Meet with the videographer in advance to review the agenda and select specific areas to highlight, including specific roundtable groups to record
- Identify a quiet space for interviews with students, patients and speakers
- Ensure adequate lighting and sound for a high quality video capture. This includes the interview space as well as during the IPE event itself
- Pre-select and schedule interviews, with questions created in advance, and provide a volunteer to handle the logistics on site
- Not everyone wishes to be recorded or visible online. Be sure to have all students, patients and speakers sign a release form. If anyone requests to be excluded from video, make the necessary arrangements, including selective seating, groupings and interviews. Notify the videographer of those who are not to be recorded

**Steffens Tip:** At the **Steffens SCL-IPE** event, there is a complete unedited video taken from the start of the event through completion. From this recording, highlighted short segment videos are produced of various key event elements (e.g. speakers, roundtable discussions, and simulations). In addition, there is produced a five to seven-minute highlight video of the entire event, and a video of pre and post interviews of students and patients.

If your event is to be conducted virtually, be sure to enable the recording feature. If anyone does not wish to be recorded, they can be edited out in post-production or placed in a separate non-recorded breakout room.

Sample videos of **SCL-IPEs** can be viewed at **SclerodermaVideo.com** From the site menu, select **Steffens Foundation** to view.


See **Appendix 12: Release Form for Media Recording - Live & Virtual Events**

## V. Resource/Bibliography

An extensive resource bibliography has been developed by the Steffens Foundation's EAC with input from a number of academic and healthcare experts, for use in pre- and post- scleroderma interprofessional education events. The bibliography consists of books, magazine articles, videos, movies, website URLs, research articles, lectures related to scleroderma and the **SCL-IPE**s participating disciplines.

Before the event, the resource list is provided to each of the college instructors whose students are attending the **SCL-IPE** event. The bibliography is used for each instructor's own scleroderma understanding and awareness, and for the professors to extend student awareness assignments prior to the **SCL-IPE**. It can also be used for any interested student, motivated by the event, to do further research projects or papers associated with scleroderma. The bibliography provides information that can be used by all the participating healthcare disciplines.

See **Appendix 5: Steffens-EAC Bibliography for Students & Faculty**

## VI. Patient "Home Base" & Welcome Table

At live scleroderma events, it is good to have a Welcome Table for patients. The Welcome Table acts as the home base for participating patients, where patient volunteers feel a sense of belonging as a cohesive group. The Welcome Table represents a place where patients can

- Check in, be cordially greeted and thanked for their volunteer participation
- Store their personal belongings and have family members sit together
- Meet and converse with other patients
- Have questions answered
- Seek help if needed during the event
- Receive information about event program changes
- Be encouraged to respond to a survey
- Provide further contact information
- Learn about local, state and national scleroderma organizations and peruse scleroderma related materials

## VII. News & Media Outlets

The presence of media representatives during a live or virtual IPE can provide a number of benefits. Media coverage, including local newspapers and television stations, can be extremely useful for future fundraising efforts, as well as patient recruitment. It can also help to increase awareness of scleroderma to the public and healthcare professionals.

Examples of media and publicity for the IPE include:

- E-Newsletters and websites of participating organizations in IPE
- Local area newspapers (print and digital)
- Publications and conferences of National Scleroderma Foundation and IPE professional organizations
- Regional scleroderma meetings
- YouTube and social media outlets
- Press releases

## VIII. Zoom & Computer Technical Literacy

In this day and age of ubiquitous online access, it may seem like we can assume a certain level of comfort with tools such as Zoom. However, it is still quite important to ensure that staff, speakers, patients and students all have the required level of comfort with technology, so this does not become a barrier to a successful event.

Holding one or two pre-event "practice meetings" will greatly help to ease any anxiety that participants may have with using the technology. In addition, these online sessions provide opportunities for patients and other event participants to:

- Resolve equipment issues, and ensure software is up to date
- Practicing Zoom skills including entering and exiting breakout rooms
- Receive tips on group discussion skills and group dynamics (See section IX for more on this)
- Gain clarity on purpose and objectives of the **SCL-IPE** event
- Have questions answered
- Hear about program changes

## IX. Patient Advocacy Training - "The Art of Advocacy"

In 2022, a new program was introduced to better prepare patients for their role as "Patient Educators" in the **Steffens SCL-IPE**. "The Art of Advocacy" program was designed specifically to provide guidance on ways patients can share their individual stories. This 60-minute Zoom session was offered twice prior to the **Steffens SCL-IPE**, on different days and times to allow for greater participation.

The discussion was designed and facilitated by patients for patients. Participants learn various skills to help share and articulate their journey to educate and enlighten including:

- How to openly and honestly share the impact scleroderma has on their daily lives and take ownership of their story
- Practice guided interviews
- Highlight transitions from one topic to another
- Time management
- How to focus on parts of their story that make the biggest impact

To learn more about The Art of Advocacy, contact: info@steffens-scleroderma.org

***Click to view "The Art of Advocacy" video***

# 6. IPE Financials

## I. Creating a Budget

The budget information provided is an estimate of what it could potentially cost an organization to execute an IPE event without pre-existing affiliations with a college or university. To reduce costs of program implementation, collaboration with a local college or university that has health sciences programs would also be of benefit as you have a captive audience (the students enrolled in health science programs) most of which have IPE-related requirements (also called competencies) as part of their programs. In addition, this collaboration may preclude the need to pay for space, IT support and related equipment, printing, and photography, among other expenses. This would truly be the ideal circumstance for implementation of your IPE event.

However, we recognize that not all organizations are going to have these affiliations and that it may take some time to develop them. Therefore, some considerations for cutting costs on expenses may include seeking donated space, equipment and services. Consider seeing if your desired venue would be willing to donate space for a period of time or offer you a reduced hourly rate. If you are seeking videography and photography services, you may consider reaching out to a local college or university that has these types of programs. Students are always looking for ways to boost their resumes and gain valuable experience. Some speakers may offer reduced rates or only require you to pay for travel expenses if they are invited by a non-for-profit organization to deliver a keynote speech. Trying to find local speakers that are content experts or bringing in speakers virtually (even during in-person events) are also options for decreasing cost.

**Steffens Tip:** During our in-person programs, those preparing food for the event participants were enrolled in a Dietetic Internship and overseen by a registered dietitian (RD). We would recommend that if you are offering food to participants, to collaborate with an accredited Dietetic Internship and be sure that the production and delivery is overseen by an RD for food safety purposes. You could also collaborate with a culinary program with expertise in preparing food for specific therapeutic diets. We were fortunate that this offering was tied into a project for those Dietetic Intern(s) involved in the IPE. Therefore, there was no associated expense. We also were able to get all food donated from a local food co-op.

If you are paying for budgeted items, keep in mind that as a not-for-profit organization you are tax-exempt. The cost of your program may decrease over time and/or you likely will have items that are a one-time expense (such as training or signage). As you can see from the budget a virtual event is typically lower cost, however, may require additional pre-planning or engaging a third party company, to ensure that any potential technical glitches are accounted for.

## IPE Budget Items*

| | In-Person | Virtual | Budget Narrative |
|---|---|---|---|
| **Worse Case Totals:** | **$11,250** | **$8,200** | Many of these costs will not apply to universities or other hosting organizations. |
| **1. Staffing Resources** | | | |
| a. Videographer | $3,500 | | Assumes 3 hours of videography plus editing |
| b. Photographer - photos | $600 | | Optional cost (1-2 hours), of in-person event may be up to $600 for 3-hours |
| **2. Technology** | | | |
| a. Virtual Event | | $5,000 | Fee for service for online event(s) - Includes staff for multiple events: IPE, webinar, online facilitation training at $1000 per event |
| b. Virtual Collaboration Tools (e.g. Zoom License) | | $1,200 | Annual Zoom License including Webinar and Data Storage:<br>Annual Business License: $199<br>Data Storage: $400<br>Large Meeting Add-on: $600 |
| **3. Event Execution** | | | |
| a. Speakers/ Panelists - Travel expenses | $1,000 | | Hotel and Airfare for up to 2 speakers at $500 each |
| b. Nutrition Table, breaks | $1,000 | | Estimated Food/Catering Costs |
| c. Space Rental | $1,500 | | Venue fee to host event at local hotel or conference center; space may be donated for non-profit foundations |
| d. Audio/Visual | $650 | | Cost for microphones, projectors and other AV equipment charges by venue |
| e. Display Materials (Banners, etc.) | $500 | | Signage estimate based on previous expenses (may be reusable) |
| f. Other Materials (printing, supplies) | $500 | | Stationary materials such as programs if paper products are desired for use vs. digital. |
| g. Honoraria/ Speaker Fees for speakers, patient participants and expert panel guests and volunteers | $2,000 | $2,000 | As needed |

*These are worst-case numbers, and in most cases you will find ways to reduce or eliminate many of these costs.

## II. Obtaining Funding and Tips for Containing Costs

There are a number of ways to obtain funding for your IPE. Sponsorships and Foundation Grants may provide some financial opportunities. For example:

- Companies in the healthcare industry and community are candidates to help financially sponsor a Scleroderma IPE. These companies include pharmaceutical, medical education, and medical equipment.
- Non-profit foundations associated with large national companies, local businesses, and national and local healthcare associations may have an interest in providing partial or total funding for the Scleroderma IPE. These organizations can also reduce event costs by providing event space, book donations, printing, IT support et al.
- Individual donors and philanthropists can be approached to assess their interest in support and sponsorship.
- Networking at national and local conferences and events can provide opportunities for joint work and shared financial funding.

**Steffens Tip:** Networking at the 2019 National Scleroderma Conference resulted in a generous donation by the Boehringer- Ingelheim corporation of over 1,000 copies of scleroderma books to be used by participating students, professors, panelists, and patients. Donated book titles were:

- ***Learning What Scleroderma Means*** (morethanscleroderma.com)
- ***Living With Scleroderma***
- ***Caring for Someone With Scleroderma*** (morethanscleroderma.com)
- ***Nurses Guide to Systemic Sclerosis***

In return for being an event sponsor, companies or individuals can receive recognition in the IPE event program, have a table at the IPE event with handouts and literature related to their products/services, and perhaps be a participant in the Expert Panel, or give a talk on a subject of mutual interest.

See **Appendix 13: Sponsorship Opportunities List for Steffens SCL-IPE** for suggestions.

# Contact Information:

Need assistance? Reach out to info@steffens-scleroderma.org.

# INTERPROFESSIONAL EDUCATION:

## A Patient-Centric Approach to Teaching Healthcare Professionals

Steffens Scleroderma Foundation

*Breaking the Chains*