

8 Milestones To Set Your Innovation Project Up For Success

Click an icon to explore **physician-focused** resources at PHC.

Important: Milestones may happen concurrently or in a different sequence. Be sure to review the full roadmap before beginning your innovation journey.



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● 01. Find out how the Innovarium can support your project

Key Tasks:

- Schedule a **free consult** with Innovarium to help navigate through the organizational approvals
- Engage with **PHC Ventures** to help assist with industry/vendor collaborations and agreements, especially where the project requires use of a PHC site or resource

Tips:

- Attend **Innovarium-sponsored events**
- Stay informed about PHC's **innovation initiatives**

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● 02. Engage with clinical leadership and partners

Key Tasks:

- Discuss impact on **operations** with division or department head; seek operations support and approval early; consider downstream impact (staff engagement, nursing involvement, workflow changes, operational processes, etc.)
- Locate mentor(s) and champion(s)
- Engage a **patient/family partner**, consider **patient-oriented research**
- Obtain agreement amongst team on who the team lead is and which institution (e.g. health organization: PHC, VCH, etc.; or academic institution: UBC, SFU, etc.) they represent, to help determine IP ownership
- Obtain peer review & feedback from partners

Tips:

- Identify how the project will transition to the new SPH and seek relevant approvals
- Consider how your innovation fits with the **space policy** given the freeze on new clinics & expansion to existing clinics

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● 03. Design protocol and determine budget

Key Tasks:

- Create a project plan, proposal or protocol
- Determine your evaluation metrics
- Consider [free consult with Advancing Health](#) for research support services
- Review [funding opportunities](#)
- Clarify with team members key details including compensation (equity, payment), expected recognition/ acknowledgement, in-kind contributions
- Implement a [project charter](#) once funding in place

Tips:

- Confirm gap and intended impact of solution; conduct a market analysis
- Consult [Value-Based Health Care](#) for projects that measure health outcomes and require assistance in calculating the relative costs of delivering care
- Identify [environmental sustainability](#) impacts
- Consider [Indigenous Wellness & Reconciliation](#) and [Equity, Diversity & Inclusion](#)
- Review program and PHC strategic plan/metrics
- Review [Advancing Health Process Map](#)
- Review [Project Management](#) and [Change Management](#) practices
- Consider requirements of working with team members who are not credentialed at PHC
- Be aware that funding housed at PHCRI or UBC requires REB approval to open account and access funds; industry-funded projects and clinical trials are charged a 30% overhead

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● 04. Set correct framework of contracts and legal agreements

Key Tasks:

- Determine which legal agreements or contracts are required; typically includes investigator contracts, nondisclosure agreement, project contracts, device loan agreement
- Review with independent legal counsel: contracts, medical-legal considerations, and patient consent form; start this process early as it can take time
- Clarify indemnity and insurance
- Connect with [PHC Ventures](#) for industry-related contracts & procurement

Tips:

- Share only the minimum necessary project details with industry partner until relevant contracts have been signed
- Contact [CMPA](#) and/or independent legal counsel, and [Clinical Risk Management](#), particularly if innovation is not Health Canada approved or there are risks to patients
- Ensure device loan agreement includes who is responsible for device shipping charges, repairs, battery replacement, insurance, damage, theft, loss, etc.
- Delineate limits of responsibility in the consent form for patient harm (e.g. a medical device did not correctly report hypotension and patient had complications due to delayed diagnosis)
- If project may involve Intellectual Property, review milestone 5 before finalizing contracts
- Be aware that CFO approval is required for new contracts, renewals & extensions
- Be aware that BC/Canadian companies will be prioritized

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● 05. Consider Intellectual Property (IP)

Key Tasks:

- Review [PHC's IP Policy](#) and consult with [PHC Ventures](#)
- If you or a team member are UBC-affiliated, consider [Innovation UBC](#) (previously known as UILO) requirements for investigator-led projects
- For projects where there is a UBC affiliation, or UBC research/funding/equipment being used, UBC has first right of refusal to register the IP; allocation of economic benefits is completed on a case-by-case basis and considers the inventor, UBC and PHC
- If you or a team member are SFU-affiliated, consider [SFU Technology Licensing Office](#) requirements

04 Review contracts & legal agreements



05 Plan for Intellectual Property (IP)



08 Launch, evaluate & share results

Tips:

- **IP** includes: **patents, trademarks, industrial designs, integrated circuit topographies, copyright**
- Understand IP based on invention: internal or external to PHC, sponsored research, PHC research, university or third-party affiliations, Indigenous IP
- Consider IP requirements if team members are not credentialed at PHC and are affiliated with UBC/SFU
- Prior to disclosing potentially proprietary information, assess for nondisclosure agreement, compensation, acknowledgement/co-authorship/IP
- Report, protect, and commercialize IP; report using [PHC IP Disclosure Form](#)

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● 06. Leverage the PHC data infrastructure

Key Tasks:

- Connect with **Clinical Informatics** (CST Cerner) or your program's **Clinical Informatics Specialist** for Electronic Health Record (EHR) changes and use
- Reach out to **Data Analytics & Evaluation** (DA&E) for analysis of EHR data

Tips:

- Review PHC's **Dashboards and Reports**
- Consider using the **Integrated Health Informatics Datalab** (IHID) for clinical or research-focused projects requiring aggregate dataset



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● 07. Regulatory approvals

Key Tasks:

- Complete **ARECCI Ethics Screening Tool** to determine need to **apply for ethical review**
- Apply for **REB approval**, if required
- **Privacy Impact Assessment (PIA)** is required if implementing/upgrading clinical system/software, conducting patient/staff survey, sharing data with another health organization, creating database, recording patients
- **Security Threat Risk Assessment (STRA)** is required when there is a new IT system/application, or upgrade to an existing one
- **Health Canada approval** for medications, devices, algorithms, etc.

Tips:

- Budget \$3500 for REB review of industry-sponsored research projects
- PHC Ventures will complete approvals such as UBC sign-off, REB, PIA, insurance, etc. for projects that are completed in partnership with PHC Ventures
- Note that a project with REB approval does not generally require a separate PIA
- Review **PHC's Ethical Decision-Making Framework** or reach out to **Ethics Services**
- Review **PHC's GenAI Policy**
- Submit a **Cybersecurity Consultation and Advisory Service Request** with a completed **Security Intake Workbook** if project is technology-related
- Liaise with **Lower Mainland Biomedical Engineering** for device assessments
- Obtain approval for WI-FI use for devices from **Lower Mainland Biomedical Engineering** and **IMITS Security**



08 Launch, evaluate & share results



07 Plan for regulatory approvals

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● 08. Launch, evaluate and spread

Key Tasks:

- Launch & evaluate project
- Present & publish findings
- Review for spread and scale within and outside of PHC

Tips:

- Discuss with Operations the need for a briefing note or business case for implementing the innovation into clinical practice
- Consider collaborating with **PHC Ventures** to further develop the business
- Connect with **Communications** to have a story written



Physician-focused Innovation Roadmap

Have questions or feedback?

E-mail: innovarium@providencehealth.bc.ca

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Partners & Sponsors

Providence Health Care Innovarium

Innovarium is Providence Health Care's innovation engine that connects people, systems, infrastructure, and partners to accelerate health innovation. We want to improve care and achieve better outcomes for people throughout BC and beyond.

www.innovarium.org

Providence Health Care Physicians and Surgeons Society (PHC-PASS)

The PHC-PASS 'Discover, Learn & Innovate for Impact' Medical Staff Pillar (Learning Pillar) supports innovation opportunities for medical staff, with funding from the Specialist Services Committee's Facility Engagement initiative.

phcmedstaff.ca/strategicpillars

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