



THE JOANNA BRIGGS INSTITUTE

# The Joanna Briggs Collaboration Handbook 2017



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# Introduction

*‘Collaboration thrives on diversity of perspectives and constructive dialogue between individuals negotiating their differences, while sharing [a] voice and vision.’*

Vera John-Steiner

The Joanna Briggs Collaboration (JBC) has existed since the Institute’s inception in 1996 and has grown from a small group of seven Centres, located predominantly in Australia, to now more than 80 Collaborating Entities across the world. This group, along with the staff of the Joanna Briggs Institute (JBI), are driven by a united desire to contribute to the improvement of global health outcomes. Our collective vision, mission and values are as follows:



## Our Vision

A world in which the best available evidence is used to inform policy and practice to improve health in communities globally

## Our Mission

To facilitate the synthesis, transfer and implementation of the best available evidence to ensure the feasibility, appropriateness, meaningfulness and effectiveness of health policy and practice

## Our Values

In undertaking this mission, the Institute is guided by core values that include mutual respect between nations, professions and cultures, professionalism and ethical conduct; and a robust and transparent approach to the production of high quality, accurate information for health professionals and citizens internationally.

This robust and thriving group are now at the forefront of cultural change in the healthcare industry and each Centre continues to lead evidence based initiatives in their region, country, state or specialty.

It is vitally important that the Institute and Collaboration are always open to new ways of working together. However, it is also important that some operational guidelines are in place to ensure a smooth, fair and equitable relationship that values difference between groups and identifies mutual benefit. The guidelines set out in this handbook are designed to achieve this.

I trust that you will find your experience of collaboration with JBI a fruitful and rewarding one, and I look forward to working with you as part of this diverse and innovative group.

**Associate Professor Zoe Jordan**  
**Executive Director**

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# Section 1: Structure

## Introduction

The JBC has a framework through which it recognises “JBI Centres of Excellence” that contribute to furthering the vision and mission of the Institute globally and other smaller “JBI Affiliated Groups” that are interested in participating in JBI activities and in utilising JBI methods and methodologies. This structure is managed both regionally, to foster regional collaborative efforts and mentorship and support of novice groups by more experienced ones, and internationally through JBI in Adelaide in order to maintain the Institute’s international focus and, where appropriate, to foster inter-regional collaboration.

## Regions

The JBC is situated across five regions (Americas, Asia, Australia, Central and Europe). Each region is comprised of Centres of Excellence and Affiliated Groups that work together strategically to promote and support evidence informed approaches to the delivery of health policy and practice in their region. Regions are encouraged to be politically active and to drive change related to how evidence synthesis, transfer and implementation are recognised and valued at institutional and government levels.

## JBI Centres of Excellence

These Centres have established themselves as a prestigious hub of expertise, through which high quality programs of evidence synthesis, transfer and implementation are achieved. They are recognised by the Institute as an entity that provides leadership, support, guidance and mentorship to novice groups, and they meet the required competencies and key performance indicators as set out by the Institute. JBI Centres of Excellence are eligible to receive funding from JBI for activity including attendance of the Centre Director or their proxy at the annual general meeting.

## JBI Affiliated Groups

These Groups are committed to promoting and supporting evidence synthesis, transfer and implementation. They are smaller, tactical groups of skilled clinicians, academics and scientists with a defined focus who operationalise JBI method and methodology within their jurisdiction. JBI Affiliated Groups are not eligible to receive funding from JBI, but are supported through access to resources and are welcome and encouraged to attend the annual general meeting of the JBC.

## Regional Chairs

Each region has a governance structure based upon a Regional Chair who is nominated and elected by Centres and Groups within the Region and must be situated within a JBI Centre of Excellence. Regional Chairs are responsible for co-ordinating regional communication and activity/events and for fostering regional collaboration. Regional Chairs serve for a term of one year and are remunerated for their investment in this role. Co-Chair appointments per region are welcome, particularly where the Co-Chair is Chair Elect for the coming year.

## JBI Committee of Directors

The Committee of Directors (CoD) is the principal strategic planning committee of the Joanna Briggs Collaboration. The Committee of Directors consists of the JBI Executive Director (Chair), all JBC Centre of Excellence Directors, and the Executive staff of the Joanna Briggs Institute.

The Committee of Directors meet three times per year, twice by teleconference and once face to face, alternating between a business meeting in Adelaide, Australia and the location of the biennial colloquium. Centre of Excellence Directors or their nominated proxy are required to attend all CoD meetings.

## JBI Collaboration Support Unit

The JBI Collaboration Support Unit (CSU) exists to facilitate the operation and administration of the Joanna Briggs Collaboration and its 80+ Collaborating Entities. The CSU provides administrative, management and strategic support to Collaborating Entities from application to formation and beyond. The CSU plans and facilitates all CoD meetings, development of resources and materials and general communication, and maintains systems for:

Monitoring and feedback;

Engagement with regions and regional chairs; and

Policy development and review .

## JBC Intranet

The JBC intranet is designed and maintained exclusively for the use of JBC Centre Directors and core staff. It has been developed to provide the JBC with current resources pertaining to their collaborative activities, including administrative information and communication and resources to assist in the conduct of Systematic Reviews, specialty nodes of JBI Connect+, and evidence implementation projects.

The JBC intranet is available at;

<http://joannabriggs.org/login.aspx>



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# Section 2: Operations

## Introduction

The Joanna Briggs Collaboration operates under a matrix system whereby Collaborating Entities receive recognition for their activities via a points system (see 'JBC Activity and Funding Matrix' below). This system has been devised in order to formally acknowledge the important scientific and scholarly contributions of Centres and Groups to the ongoing mission of JBI globally and to ensure an equitable and sustainable international organisation.

## Entity Terms of Agreement

### JBI Affiliated Groups

All new Collaborating Entities enter the Joanna Briggs Collaboration with the status of an Affiliated Group. Affiliated Groups may focus on evidence review, evidence transfer, evidence implementation or a combination of these foci.

Affiliated Groups may be independent, or aligned with a Centre of Excellence. Affiliated Groups that are aligned with a Centre of Excellence may choose to credit any eligible points for their Group activity to their nominated Centre of Excellence, in return for support, mentorship and guidance provided by the Centre. Should an Affiliated Group seek to become a Centre of Excellence, the process outlined under 'Entity Application Process' on page 9 of this Handbook should to be followed.

#### 1. Terms of agreement

In order to qualify for and maintain Affiliated Group membership, an Affiliated Group must:

- 1.1. be a self-governing and self-funding group of persons (individual or corporate)
- 1.2. consist of at least three core staff who:-
  - 1.2.1. are tertiary qualified graduates with research training;
  - 1.2.2. have, and can demonstrate, strong professional leadership skills; and
  - 1.2.3. can evidence a track-record of research capability;

- 1.3. possess sufficient resources to conduct systematic reviews or implementation studies;
- 1.4. ensure that all of its core staff have successfully completed a JBI Comprehensive Systematic Review Training Program or Clinical Fellowship Program;
- 1.5. conduct activities in line with the current edition of this Handbook

#### 2. Key Performance Requirements

Affiliated Groups are required, at a minimum, to meet the following KPIs over the term of their 3-year Agreement with JBI:

- 2.1 have at least three (3) systematic review reports or implementation reports accepted for publication; and
- 2.2 participate in the JBISRIR peer review process including protocols, reviews and implementation reports.

Affiliated Groups who wish to apply for Centre of Excellence status are required to meet the following KPIs to be eligible to submit an application:

- 2.3 have operated as an Affiliated Group for a minimum of 12 months; and
- 2.4 have accrued a minimum of 30,000 points in one (1) year, as per the Activity and Funding Matrix in Section 2 of this Handbook, including at least 10,000 points from one (1) core activity .

#### 3. Support from JBI

JBI shall provide, at a minimum, the following support to Affiliated Groups:

- 3.1 access to the Collaboration Support Unit;
- 3.2 access to JBI web resources for Group staff for the purposes of undertaking JBI Collaboration work;
- 3.3 an online presence via the JBI website;
- 3.4 access to standard JBI promotional materials
- 3.5 license to use the registered JBI name and trademark; and
- 3.6 20% discount from JBI's commercial partner, Wolters Kluwer Health (Ovid), for all JBI tools and databases.

## JBI Centres of Excellence

### 1 Terms of agreement

In order to qualify for and maintain Centre of Excellence membership, a Centre of Excellence must:

- 1.1. establish the Centre within a month after the Effective Start Date;
- 1.2. appoint a Director of the Centre who will manage the Centre in accordance with, and to such standards specified in, this Handbook;
- 1.3. be a self-governing and self-funding group of persons (individual or corporate);
- 1.4. cover all costs in connection with the establishment and operation of the Centre;
- 1.5. ensure that a minimum of three core staff have successfully completed a JBI Comprehensive Systematic Review Training Program or Clinical Fellowship Program;
- 1.6. manage the Collaborative Activities of the Centre in the manner prescribed for such activities in this Handbook;
- 1.7. perform such Core and Elective Key Performance Activities as are sufficient to enable the Centre to meet the standard for continuing membership as a JBI Centre of Excellence as described in this Handbook.
- 1.8. participate in an annual formative review of Centre activities in years one and two of their 3-year agreement with JBI; and
- 1.9. participate in a summative review of its Centre Activities prior to the Completion Date of their Agreement in accordance with this Handbook.

### 2. Key Performance Requirements

Centres of Excellence are required, at a minimum, to meet the following KPIs by the Completion Date of their 3-year Agreement with JBI:

- 2.1 accrue a minimum of 90,000 points from core and elective activities completed in line with the JBC Activity and Funding Matrix in this Handbook; including
- 2.2 a minimum of 30,000 points from core activities which is equal to three (3) systematic review reports or implementation reports accepted for publication; or 120 new OR 240 updated ES OR RP uploaded to C+; and
- 2.3 attend all JBC teleconferences, face-to-face meetings and colloquia/conventions.

Centres who do not meet the above KPIs by the completion date of their Agreement with JBI will be varied to Affiliated Group membership.

### 3. Support from JBI

JBI shall provide, at a minimum, the following support to Centres of Excellence:

- 3.1 access to the Collaboration Support Unit;
- 3.2 access to JBI web resources for Centre staff for the purposes of undertaking JBI Collaboration work;
- 3.3 an online presence via the JBI website;
- 3.4 access to standard JBI standard promotional materials;
- 3.5 license to use the registered JBI name and trademark;
- 3.6 if eligible, one return economy class discount airfare for the Centre Director or nominated proxy to attend the annual face to face Committee of Directors meeting and associated Convention/ Colloquium in full;
- 3.7 if eligible, one complimentary subscription for one single health care facility that works in collaboration with the Centre; and
- 3.8 if eligible, funding for output of prescribed core and elective activities up to a maximum amount of AUD \$10,000 per annum (as per the JBC Activity and Funding Matrix in this Handbook).

## Entity Application Process

Entities seeking to engage with the work of JBI can do so by applying to become an Affiliated Group. All Entities join the JBC begin as Affiliated Groups and are required to exist for a minimum period of 12 months before applying to have their status elevated to a Centre of Excellence. Affiliated Groups must also demonstrate successful engagement with JBC activities and accrue the minimum points required for consideration as a Centre of Excellence.

## JBI Affiliated Groups

Entities wishing to apply to become a JBI Affiliated Group are required to complete an application form . The application is then reviewed internally by JBI, with the JBI Executive Director granting final approval . Approved Groups are required to sign a JBI Letter of Agreement which holds a 3-year term. If an Affiliated Group wishes to align or partner with a Centre of Excellence they may do so, however such an agreement is independent of JBI.

## JBI Centres of Excellence

Once an Affiliated Group has existed for at least 12 months, has met the required competencies and key performance indicators as set out by the Institute, and has made significant contributions to the culture of evidence-based policy and practice, they may apply to become a Centre of Excellence. The Centre of Excellence application must include a projected budget and business plan for the first three years of operation.

Following the lodgment of a Centre of Excellence application, the Collaboration Liaison Office forwards the application to the JBC Review Committee for consideration. The JBC Review Committee is comprised of a Centre Director from each region, and collectively they provide a recommendation to the Executive Director based upon the strength of the proposal. The Executive Director JBI then reviews the application, considering the JBC recommendations, with the final decision made by the JBI Executive Director.

Approved Centres are required to sign a JBI Letter of Agreement which holds a 3-year term. The effective date of the Agreement will be 1 January the year following the application's approval and signing date. This is to align with JBI's calendar year review period.

If an Affiliated Group is aligned with a Centre of Excellence and has been crediting points for its activities to its partnering Centre of Excellence, and wishes to begin accruing points for activities conducted by their Centre, share points for activities or retrospectively transfer points in order to apply to become a Centre of Excellence they must follow the process outlined in 'Collaborative activities between JBC entities and points allocation or transfer' on page 16 of this Handbook.





## Naming Conventions

Centres and Groups are encouraged to establish themselves under a title that describes their area of focus, be that regional/ jurisdictional or specialty . All Centre and Group titles will be followed by a statement pertaining to their status as a Centre of Excellence or Affiliated Group . Newly formed Centres and Groups should consider the structure and focus of all JBI Entities in their region and be mindful of the names and roles of those Entities.

For example:

The Centre for Chronic Disease Management: A Joanna Briggs Institute Centre of Excellence; OR

The Centre for Chronic Disease Management: A Joanna Briggs Institute Affiliated Group

## Entity Disestablishment Process

Where an entity wishes to withdraw from a Centre of Excellence or Affiliated Group Agreement they must:

- 1 Provide not less than three months written notice to the JBI Executive Director (unless an earlier termination is agreed by the Parties in writing)
- 2 Return any and all materials (marketing/teaching or otherwise) to the Institute as well as remove any online reference to JBI and associated logos
- 3 Undertake to delete any and all electronic copies of JBI Intellectual Property, including that pertaining to short course delivery .
- 4 The entity will notify their clinical partner that complementary access to JBI tools and resources will cease within three months of the date of termination.
5. The withdrawing Collaborating entity shall appropriately dispose of all JBI materials provided by JBI for the operation of the Collaborating entity including but not limited to promotional materials, letterheads, pens, BPIS, business cards, display materials etc . and that the costs of disposal of abovementioned materials be the responsibility of the withdrawing Collaborating entity
6. The withdrawing Collaborating entity shall cease to use and return to JBI all JBI intellectual property and/ or records supplied by JBI . Membership mailing lists provided to the Collaborating entity remain the property of JBI and shall not be used by the withdrawing Collaborating entity for any reason without prior consent of JBI
7. JBI shall remove reference to the withdrawing Collaborating entity from the official JBI webpage and other promotional materials
8. JBI shall remove membership access rights to the JBI website, SUMARI and RAPid (and other similar packages held by JBI) that had been provided to the withdrawing Collaborating entity gratis as a benefit of collaboration . Any data and/or publications stored electronically by JBI remain the copyright of JBI however the withdrawing Collaborating entity's host institutions or staff retains authorship . The Author(s) agree that any future publications by the author(s) referring to work undertaken during the term of collaboration shall acknowledge the other parties
9. The withdrawing Collaborating entity shall provide JBI with an activity statement and acquitted financial report for all JBI Collaboration activities up to the termination date for the JBI annual report

## JBC Activity and Funding Matrix

The JBC Activity and Funding Matrix system enables Affiliated Groups and Centres of Excellence to accrue points across a variety of core and elective activities over the course of their 3-year Agreement with JBI, in line with the Key Performance Requirements outlined in this Handbook. The minimum number of points required to become a Centre of Excellence is 30,000 across all core and a range of elective activities. Detailed descriptions of activities, KPIs and Matrix system operational guidelines are outlined in detail below.

CORE				
Key Performance Indicator	Output Target	Points	Funding	Outcome Measure
<b>► Attendance at JBC Committee of Directors meetings (CoD) AND</b> <b>At least one of the following three activities below (A, B and C):</b>				
Must demonstrate: that the Centre of Excellence Director (or proxy) has attended all relevant CoD meetings in the preceding 12 months, including 2 Teleconferences and 1 face-to-face meeting (including Conference, 5 days in full)	3 meetings per calendar year	2,000 (1x face-to-face) 1,000 (2x tele-conference)	One economy class return fare for the face-to-face meeting	Attendance demonstrated in minutes of relevant meetings; conference registration
<b>A – JBI systematic review</b>				
At least one systematic review report must have been accepted for publication in the JBISRIR; <b>AND</b> Must have author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group	Determined by Entity	10,000 (Systematic review report) 2,000 (Systematic review protocol)	\$3000AUD per review published	Publication recorded in the Entity Annual Report; verified by JBI
<b>B – Implementation report published in the JBI Library</b>				
At least one Implementation report must have been accepted for publication in the JBISRIR; <b>AND</b> Must have author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group	Determined by Entity	10,000	\$3000AUD per report published	Publication recorded in the Entity Annual Report; verified by JBI
<b>C – Node Management and content development</b>				
Evidence of X3 ERG/Chair/ Meetings per calendar year, PLUS a minimum of 60 new OR 120 updated ES OR RP uploaded to C+	Determined by Entity	20,000	\$3000AUD	Each KPI is recorded in the Entity Annual Report

ELECTIVE				
Key Performance Indicator	Output Target	Points	Funding	Outcome Measure
<b>▶ Participation in Peer Review for the JBI Library</b>				
Core staff must actively contribute to peer review for the JBISRIIR in the preceding 12 months through: - Systematic Review Protocol (points allocated per peer review) - Systematic Review Report (points allocated per peer review) - Implementation Reports (points allocated per peer review)		Protocols: 500 Review: 1,000 Report: 1,000	N/A	Peer Reviews undertaken and recorded in the Entity Annual Report; verified by JBI
<b>▶ Node content</b>				
Bundles of ES/RP where one bundle = 2 items of new content or 4 items of updated content uploaded to C+. Multiple bundles may cross multiple Nodes	Determined by Entity	250 per bundle in C+	N/A	Publications recorded in the Entity Annual Report; verified by JBI
<b>▶ Engagement with a Clinical Partner</b>				
Must demonstrate an active relationship through: Co-authorship of any published scholarly work related to JBI activity with staff of the clinical partner, including in languages other than English (must have an author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group) <b>AND</b> Conduct at least 2 JBI workshops in the Clinical Partner for its staff, <b>AND</b> Provide active facilitation or training in the use of JBI tools and resources in the Clinical Partner (at least one of the following: Manual builder, Consumer pamphlet builder, Journal Club, CAN-Implement .Pro(c), Searching via OVID, or Connect+.	Determined by Entity	5,000	Cost of ONE FACILITY as per agreement with Wolters Kluwer Health	Engagement activity demonstrated in Entity Annual Report
<b>▶ Participation in JBI Methods Groups and or Membership of other JBI committees</b>				
Must demonstrate active participation in a methods group, committee or working group through: Attendance at all face-to-face meetings, workshops and teleconferences; <b>AND</b> Substantial contribution to the required output of the methods group, committee or working group at the discretion of the group chair/convenor (including but not limited to authorship on a publication about the method [excludes papers simply using the method], timely and constructive review of JBISRIIR manuscripts, etc.	Determined by Entity	5,000	N/A	Participation is demonstrated in minutes of relevant meetings and publications arising
<b>▶ Scholarly mentorship of Affiliate or novice groups/reviewers <i>**For 2016 only**</i></b>				
A mentorship arrangement (formal or informal) must have been conducted for <b>no less than 6 months</b> during the current review period; <b>AND</b> Centre Directors must submit a brief explanation outlining current mentorship activities to the collaboration office <b>no later than 4 July 2016</b> ; <b>AND</b> Centres must submit a one page program report describing the purpose, nature and outcomes of their mentorship activities as a part of their Centre Annual Report in January 2017.	Determined by Entity	10,000	N/A	Centre Director mentorship activity email July 2016; One page mentorship report submitted with the Entity Annual Report

<b>▶ JBI Systematic Review Update (published in JBISRIR)</b>				
Must have had a protocol accepted for publication in the JBISRIR, <b>AND</b> Must have had a Systematic Review Update accepted for publication in the JBISRIR	Determined by Entity	5,000	\$1000AUD per report published	Publications are recorded in the Entity Annual Report; verified by JBI
<b>▶ Publication of scholarly works on JBI methods and methodologies arising from publications in the JBISRIR (including derivative publications)</b>				
Must have author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group, and be clearly identifiable as a publication that relates to furthering the scholarly work of JBI/JBC in the field of evidence synthesis, transfer or implementation <b>AND</b> references the original documents in the JBISRIR	Determined by Entity	2,000	N/A	Publications are recorded in the Entity Annual Report; verified by JBI
<b>▶ JBI Systematic Reviews or Implementation Reports (published in other journals, including the IJEBHC)</b>				
Must have author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group; <b>AND</b> Be clearly identifiable as a SR or IR that has followed JBI methodology and method; <b>AND</b> Have cited the protocol published in the JBISRIR (SR's only) . Publications must be originals and not derivatives or duplicates (including co-publication) of material already published in the JBISRIR) .	Determined by Entity	1,000	N/A	Publications recorded in the Entity Annual Report; verified by JBI
<b>▶ Derivative publications published in other journals (including but not limited to the IJEBHC):</b>				
Must have an author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group. Derivative papers will be recognised where the paper is published in another journal. Duplicate publication (e.g. co-publication) of material will not be recognised. Derivative papers may be derived from a published JBI Systematic Review, Implementation Report, or available JBI methodology.	Determined by Entity	1,000	N/A	Publications recorded in the Entity Annual Report; verified by JBI
<b>▶ JBI Education Programs: Clinical Fellows</b>				
Must have run at least one <b>complete</b> Evidence Based Clinical Fellowship Program (CF) in the preceding 12 months ( <b>points allocated per student report published</b> )	Determined by Entity	200 per student	N/A	Activity recorded by JBI, verified by the centre/group
<b>▶ JBI Education Programs: Systematic Review Training</b>				
Must have run the equivalent of at least one full week of Comprehensive Systematic Review training in the preceding 12 months (points allocated per registrant). Note that this does not require a full five day program to be run in one continuous week.	Determined by Entity	100 per student	N/A	Activity recorded by JBI, verified by Entity
<b>▶ Regional Chair responsibilities (1 year term).</b>				
Must produce an annual report to JBI listing collaborative activities undertaken in the preceding 12 months no later than 31 January (including, but not limited to regional meetings/events, teleconferences, collaborative work in relation to evidence synthesis, transfer or implementation); <b>AND</b> Must produce a regional operational plan using the JBI template no later than 31 January; <b>AND</b> Must facilitate one annual face-to-face meeting and two teleconferences per year (dates/agenda/minutes to be provided as evidence with annual report)	Determined by Entity	5000	\$1000AUD per annum	Recorded in regional Chair report

▶ Host a JBI/JBC Symposium				
Must have organized a minimum one-day event that promotes the work of JBI, the JBI model and/or methodologies; and is open to registration by participants outside of the hosting organisation and (where applicable) the clinical partner.	Determined by Entity	5,000	N/A	Recorded in the Entity Annual Report
▶ Host JBI Colloquium				
Must have organised and hosted a JBI Colloquium	Determined by Entity	20,000 (5,000 in planning year; 15,000 in year held)	\$5000AUD seed funding	Recorded in the Entity Annual Report

**Minimum Points Required to Achieve and Maintain JBI Centre of Excellence Status = 90,000 by then end of the 3 year Entity Agreement**

**Important Notes:**

- Funding is only provided for a Clinical Partner subscription where JBI Implementation related KPI's are met resulting in publication of a JBI Implementation Report
- All activities must be undertaken within the current (calendar) reporting year in order to be recognised for credit points
- Funding is available for JBI Centres of Excellence ONLY and will be “capped” at \$10,000AUD per Centre (excluding funding to attend the face to face Committee of Directors meetings, Clinical Partner Subscription fees, Regional Chair funding and JBI Colloquium seed funding)



## Activity Descriptions and Expectations

### Core

Core activities reflect the JBI Conceptual model of EBHC, and reflect strategic priorities for the JBI/C. Each Entity will need to select at least one of the first three core activities (systematic reviews, Implementation reports or Node management and content development), as well as participate in all JBC teleconferences, face-to-face meetings and colloquia (Centres of Excellence only).

#### Systematic Reviews

A JBI Systematic Review is one that follows JBI methodology and methods and utilises the JBI System for the Unified Management, Assessment and Review of Information (JBI-SUMARI) and is published in the JBISRIR.

To accrue points for this activity an Entity must have at least one (1) systematic review submitted to the JBISRIR for peer review each calendar year in years one and two of its Agreement with JBI, and a minimum of three (3) systematic reviews accepted for publication in the JBISRIR by the completion date of its 3-year Agreement with JBI.

Note: Systematic review protocols accepted for publication in the JBISRIR will be awarded 2,000 points upon acceptance for publication of the relevant Systematic Review in the JBISRIR. This will result in Systematic Reviews being awarded 12,000 points upon acceptance of publication. If more than one systematic review is published from a single protocol, the first systematic review will receive 12,000 points and the subsequent reviews will receive 10,000 points.

#### Implementation Reports

A JBI Implementation Report is one that follows JBI methodology and methods and utilises the JBI Practical Application of Clinical Evidence System (JBI-PACES) and is published in the JBISRIR.

To accrue points for this activity an Entity must have at least one (1) implementation report submitted to the JBISRIR for peer review each calendar year in years one and two of its Agreement with JBI, and a minimum of three (3) implementation reports accepted for publication in the JBISRIR by the completion date of its 3-year Agreement with JBI.

#### Node Management and Content Development

JBI COnect+ is an online gateway to a collection of evidence-based resources and tools designed to assist in the clinical decision-making process and to support best practice. COnect+ contains a series of specialist sections (i.e. Aged Care, Midwifery), referred to as 'nodes'. Nodes are managed by JBI headquarters in South Australia or by Centres of Excellence.

A Centre undertaking this core activity is responsible for all node content development and update, including evidence summaries, recommended practices, audit criteria and outcome indicators. The Centre coordinates the reference groups for the node (both corresponding and expert) and is responsible for the recruitment and retention of members, and for the process of content review.

To accrue points for this activity a Centre must have a minimum of three (3) people trained in JBI, Adelaide; hold at least three (3) ERG/Chair/Meetings per calendar year; and complete a minimum of 60 new OR 120 updated ES OR RP uploaded to C+ per calendar year, with a total of 120 new OR 240 updated ES OR RP uploaded to C+ by the end of its 3-year agreement with JBI.

#### Attendance at JBC meetings

JBI maintains that regular communication with and between entities across the JBC is of great importance. As such, the Institute invests in bringing regions, Centre of Excellence Directors, Regional Chairs and staff together via teleconference and face to face meetings at regular intervals.

To accrue points for this activity Centre Directors or a nominated proxy must attend all JBC teleconferences, face to face meetings and biennial colloquium (as detailed in Section 3 of this Handbook). Affiliated Group Convenors are invited to attend all meetings, however it is not mandatory.

### Elective

Elective activities were established to recognise the breadth of collaborative work being undertaken by Entities across the JBC.

#### Peer review for the JBISRIR

Scholarly peer review of content in the JBI Database of Systematic Reviews and Implementation Reports (JBISRIR) is open to all core staff of all JBI Entities. Every core staff member must be registered as a peer reviewer and is assessed on the quality of their peer review. Every effort is made to ensure that the workload associated with peer review is allocated across all entities and is aligned with individual areas of expertise.

To accrue points for this activity Entities must comply with all specified peer review requirements of the JBISRIR.

Note: Systematic Review Protocols, Systematic Reviews and Implementation Reports that are re-submitted for peer review will be eligible to receive an additional 500 or 1000 points respectively, upon completion of the second round of peer review. This will be up to a maximum of two rounds of peer review.

## Node Content

JBI will recognise node content development and updates, including evidence summaries, recommended practices, audit criteria and outcome indicators. This excludes any content that has already been awarded points as a core activity.

To accrue points for this activity Entities must upload into C+ a minimum of one bundle of content, which is equal to 2 items of new content or 4 items of updated content. Multiple bundles may cross multiple Nodes.

## Engagement with a Clinical Partner

JBI Centres of Excellence can nominate to work with a designated hospital (i.e. single site) or health facility whereby that hospital will receive a complimentary subscription to JBI resources for the purpose of promoting and supporting an evidence based approach to policy and practice. Centres that choose to take up this opportunity must demonstrate the outcomes from this work. The purpose of clinical partnership is to close translational gaps that frequently occur across the evidence based cycle. This activity seeks to recognise those Centres working directly in partnership with health professionals at the point of care. Centres that are hosted by a clinical institution may nominate their host institution as their clinical partner, but would need to demonstrate that significant effort had been made to engage a wide network of staff outside of Centre core staff through training, workshops, presentations and meetings (as outlined below).

To accrue points for this activity Centres must provide evidence of Co-authorship of any published scholarly work related to JBI activity with staff of the clinical partner, including in languages other than English (must have an author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group); Conduct and provide evidence of at least 2 JBI workshops in the Clinical Partner for its staff; and provide evidence of active facilitation or training in the use of JBI tools and resources in the Clinical Partner (at least one of the following: Manual builder, Consumer pamphlet builder, Journal Club, CAN-Implement.Pro(c), Searching via OVID or Connect+).

## Mentorship

JBI recognises that mentorship can be an important and effective strategy for building skills and capacity across the JBC and that experienced JBI Centres of Excellence are in a prime position to support novice groups. It is an opportunity for us to collectively build support systems, learning and development for new entities and to improve efficiency, productivity and the passing on of corporate knowledge and leadership. This new program, currently under development, seeks to recognise those Centres providing additional support to other groups and entities and to have a more formalised framework for this process.

For the 2016 review period, JBI will recognise existing mentorship activities undertaken by Centres. To accrue

points for existing mentorship activities Centres must have undertaken a mentorship arrangement (formal or informal) for no less than 6 months during the 2016 review period; Centre Directors must submit a brief explanation outlining current mentorship activities to the collaboration office no later than 3 October 2016; and Centres must submit a one page program report describing the purpose, nature and outcomes of their mentorship activities as a part of their Centre Annual Report in January 2017.

## Methods Group/ Committee Membership

JBI Methods Groups have been established to provide ongoing guidance to the JBI Scientific Committee on new and established methodologies related to evidence synthesis, transfer and implementation. These groups consist of a convenor and administrator and relevant qualified individuals from across the JBC and externally as required in order to drive JBI methods forward. They are required to meet regularly and to develop formal written guidance on their area of expertise.

Similarly, the Institute has other committees and working groups that are convened as required to provide guidance and contribute to the ongoing development of the JBI and JBC (including but not limited to the Impact and Quality Evaluation Working Groups).

Membership on these committees is currently established either through an open call to the JBC for interested parties or, where appropriate, a targeted call to individuals from across the JBC who have significant experience or expertise in a particular field.

To accrue points for this activity Entities must have participated in the methods group, committee or working group for a minimum of 6 months within the review period; attended all face-to-face meetings, workshops and teleconferences; and made a substantial contribution to the required output of the methods group, committee or working group, at the discretion of the group chair/convenor. For example, each methods group should produce at least one publication every two years as part of their group activity (excludes papers simply using the method).

## Systematic Review Updates

JBI will consider Systematic Review Updates as Centre output where permission from the original authors has been sought; a new protocol has been submitted to the JBISRIIR justifying the need for an update; where necessary all articles are re-appraised where new JBI tools have been developed; where a new integrated synthesis is presented (i.e. including all previously included data); and where a new report is submitted to the JBISRIIR (i.e. not simply the original review with a narrative update at the end).

To accrue points for this activity Entities must have had a protocol accepted for publication in the JBISRIIR, and a Systematic Review Update accepted for publication in the JBISRIIR.

## Other Scholarly Works

Other scholarly works are defined as monographs/books, book chapters, journal articles or conference presentations or other peer reviewed work where there is clear evidence of the focus of the paper being specifically on JBI method and methodology.

To accrue points for this other scholarly works, Entities must have author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group, and the publication must be clearly identifiable as a publication that relates to furthering the scholarly work of JBI/JBC in the field of evidence synthesis, transfer or implementation; and references original JBI Methods papers or publications in the JBISRIR.

## JBI Systematic Reviews or Implementation Reports published in a journal other than the JBISRIR

JBI will recognise output in other journals. To accrue points for this activity, these publications must have an author affiliation that clearly identifies the authors as part of a JBI Centre of Excellence or Affiliated Group; be clearly identifiable as a SR or IR that has followed JBI methodology and method citing appropriate JBI methodology sources; and have cited the protocol published in the JBISRIR. Publications must be originals and not derivatives or duplicates (including co-publication) of material already published in the JBISRIR)

## Derivative publications published in other journals:

Derivative papers will be recognised where the paper is published in another journal. Duplicate publication (e.g. co-publication) of material will not be recognised. Derivative papers may be derived from a published JBI Systematic Review, Implementation Report, or available JBI methodology.

To accrue points for this activity Entities must have an author affiliation that clearly identifies them as part of a JBI Centre of Excellence or Affiliated Group; and that has followed JBI methodology and method.

## JBI Education Programs

These comprise either the JBI Comprehensive Systematic Review Training Program or the JBI Evidence Based Clinical Fellowship Program.

To accrue points for these activities Entities must have run at least one complete Evidence Based Clinical Fellowship Program (CF) or one complete Systematic Review training in the preceding 12 months. Points are allocated per clinical fellows' student report published or per systematic review student registration.

## Regional Chairs

Regional Chairs provide a communication conduit between JBI and the JBC, particularly where a co-ordinated response is required. This does not preclude other Centre Directors and staff from communicating with JBI directly, but provides a clear and manageable communications pathway for the Collaboration Support Unit.

JBC Regional Chairs are voluntary positions, however it is essential that those considering assuming a Regional Chair's position are able to devote enough time to the essential duties outlined in the JBC Regional Chair Policy, available on the JBC Intranet.

To accrue points for this activity Regional Chairs take responsibility for ensuring that Entities within a region are working together by organising at least one (1) annual face to face meeting and two (2) teleconferences per annum, and providing JBI with an annual report of activity (dates/agenda/minutes to be provided as evidence with annual report), and a regional operational plan. Regional operational plans may include, but are not limited to regional meetings/events, teleconferences, collaborative work in relation to evidence synthesis, transfer or implementation. Regions may also appoint a co-Chair who is Chair Elect.

## Hosting a JBI/JBC Symposium

A JBI/JBC symposium is a minimum one-day event that promotes the work of JBI, the JBI model and/or methodologies and methods; and is open to registration by participants outside of the hosting organisation and (where applicable) the clinical partner.

The symposium is separate to any programmatic event hosted or initiated by JBI Adelaide including colloquia and conventions. Centres/Groups must provide an event program, final number of participants and a web link where available.

Only hosting Centres are eligible to receive points for this activity. Points will not be awarded for attendance.

## Hosting a JBI Colloquium

The JBI Colloquium is hosted by a JBI Centre of Excellence every second year. Centres must "bid" to host the event, submitting a full proposal to the Committee of Directors for consideration at least two years prior to the year of the event. It is the responsibility of the Host Centre to organise all aspects of the event including, but not limited to, identification of appropriate dates, theme, venue (including AV and catering) and keynote speakers, development of an appropriate scientific program, recruitment of sponsors, and all other administrative activities (such as abstract submissions, scientific committee, registration management).

Points will be awarded to Centres hosting a colloquium in two stages, with the first allocation in the planning year and the final allocation in the year the Colloquium is held.



# JBC Activity and Funding Matrix Guidelines

## Entity Agreement Term

JBI Centres of Excellence and Affiliated Groups sign a 3-year Agreement with JBI, with an Effective Start date of 1st January the year following their Agreement Signing Date. This is to align with JBI's calendar year annual review period for collaboration activities. Centres and Affiliated Groups have until the completion of their 3-year Agreement with JBI to meet their Key Performance Requirements, with annual targets that determine Centres' eligibility to receive funding and/or to attend the face to face Committee of Directors meeting (outlined below). A 3-year agreement and a rollover system for points enables Centres to manage the balance of activities over the term of the agreement.

## Annual Review

JBI's annual review period for collaboration activities is 1st January – 31st December (calendar year). JBI conducts an Annual Review of Entity activity to evaluate Entity Key Performance Requirements in line with the JBC Activity Matrix, in February of each year. Entities participate in a formative assessment of activities in years one and two of their Agreement, and a summative assessment at the end of year 3 (outlined below), Entities must complete and submit a 'JBC Entity Annual Report' to the JBI Collaboration Support Unit by 31st January of each year (available from the JBC intranet).

### Formative Assessment

In years one and two of their Agreement with JBI, Centres of Excellence will participate in a Formative Assessment of their collaboration activities and output to date. This will enable Centres to track their progress in line with the JBC Activity Matrix and their 3-year Key Performance Requirements. The Formative Assessment will grant Centres provisional points for core activities that are still in progress in years one and two (outlined below).

Centres of Excellence are expected on formative evaluation in year one and two, to have achieved at least 27,000 points OR be able to demonstrate that a core activity is near completion (i.e. a systematic review has been submitted to JBISRIR but not yet accepted for publication) in order to be eligible for funding to attend the face to face Committee of Directors meeting (outlined below).

Affiliated Groups undertake a formative assessment each year for the first two years of their agreement. This is specifically to aid groups who intend to seek Centre of Excellence status. Formative assessment provides Groups with an indication of their progress and impact. Affiliated Groups seeking CoE status will need to accrue 30,000 points in one year (points may not be banked).

Where the annual review in year one or year two indicates a Centre is not meeting their Key Performance Requirements, the Collaboration Support Unit will assist the Centre to review their operations.

### Summative Assessment

At the completion of their 3-year Agreement with JBI, Centres of Excellence will participate in a Summative Assessment of their collaboration activities and output over the course of their Agreement. In order to maintain their membership as a Centre of Excellence, Centres are required to meet the minimum Key Performance Requirements as outlined in Section 2 'Entity Terms of Agreement' of this Handbook. Centres who do not meet these requirements will be varied to Affiliated Group membership, once status has been varied, points may not be carried across to a new Agreement. Centres that are varied to Affiliated Group membership will need to maintain at least 12 months of Affiliated Group status, and achieve the requisite points within that calendar year before applying for Centre of Excellence status.

Affiliated groups will participate in a Summative Assessment at the end of their 3-year agreement. Groups which have output commensurate with the requirements for an Affiliated Group will be invited to renew their Agreement. Groups who have not will be disestablished unless by prior arrangement they have demonstrated through a new application that capacity is likely to improve.

## Points Accrual

Centres of Excellence are required to accrue a minimum of 90,000 points, with at least 30,000 from core activities as per the JBC Activity and Funding Matrix, by the completion of their Agreement with JBI. The annual target for Centres is 30,000 points, with 10,000 from core activities. However this is a soft target that is not formally evaluated until the summative assessment at the completion of the Centre Agreement. Centres may accrue points across the full range of core and elective activities outlined in the Matrix without restriction. There is no capping of points for any activity (i.e. Centres who participate in both a JBI methods group and JBI committee would be eligible to receive 10,000 points for that activity; or if a Centre has more than one mentorship agreement with multiple organisations and fulfills the requirements of that activity they would be eligible to receive 10,000 points for each mentee). Points are eligible to be rolled over to subsequent years within the three year Agreement. However, no points may be carried across from one Agreement to subsequent Agreements.

Affiliated Groups are not required to accrue points unless they seek to apply for Centre of Excellence status (see Section 2: Operations for further details).

## Core Activities

Centres may accrue points for core activities over the course of their 3-year Agreement with JBI. In the formative assessment of Centre activities in years one and two JBI will grant provisional points for any Systematic Reviews or Implementation reports that have been submitted to the JBISRIR for peer review, but not accepted for publication. Provisional points aid Centres to reach their annual target of 30,000 points and access funding for attendance at the face to face Committee of Directors meeting.

If Systematic Reviews or Implementation Reports that have been granted provisional points in years one and two have not been accepted for publication by the Centre Agreement completion date, then those points will be retracted and will not count towards the 90,000 points Key Performance Requirement.

## Elective activities

Centres accrue points for all elective activities on an annual basis only (for activities conducted within the calendar year review period). Provisional points are not granted for elective activities. Centres must complete elective activities within the calendar year review period to be eligible to accrue points for those activities.

## Collaborative activities between JBC entities and points allocation or transfer

Where JBC Entities (Centres of Excellence and/or Affiliated Groups) work collaboratively on an activity and wish to share the allocation of points for that activity, Entities must complete the 'JBC Activity Matrix Points Allocation' form (available of the JBC intranet) and submit it to the collaboration support unit with their corresponding Entity Annual reports. Points will not be divided without the completion of this form.

Where an Affiliated Group seeks to apply to become a Centre of Excellence and it has been working in partnership with or mentored by a Centre of Excellence it must ensure that any activities/output that it seeks to accrue points for have not already had points allocated to its mentoring/partnering Centre of Excellence. If an Affiliated Group is applying to become a Centre of Excellence and its mentoring/partnering Centre wishes to transfer or share points allocation for collaborative work, it may do so using the 'JBC Activity Matrix Points Allocation' form (available of the JBC intranet).

Any partnership agreements entered into by two or more JBC entities, and their corresponding terms of agreement, are independent of and not arbitrated by the Joanna Briggs Institute.

## Rollover of Points

Any points accrued by Centres on an annual basis in excess of the minimum 30,000 are eligible to be rolled over to subsequent years until the end of their Agreement with JBI. Provisional points are not eligible for rollover.

## Centre Funding

### Eligible Core and Elective Activities

Centres are eligible to receive funding for a number of core and elective activities as per the JBC Activity and Funding Matrix (pp. 11-12). Funding for these activities is paid retrospectively following the JBI Annual Review of Centre activity in February of each year. Affiliated Groups are not eligible to receive funding for activities. Funding is capped at \$10,000 AUD per Centre, excluding funding to attend the face to face Committee of Directors meetings, Clinical Partner Subscription fees, Regional Chair funding and JBI Colloquium seed funding, outlined below.

### Face to Face Committee of Directors meeting

In order for a Centre to be eligible for reimbursement for one return economy class airfare to attend the face to face Committee of Directors (CoD) meeting it must meet the following KPIs on an annual basis:

- have accrued 27,000 points in the preceding year (provisional points accepted i.e. SR/IR Submitted for Peer Review)
- have accrued at least 10,000 points from core activities (provisional points accepted i.e. SR/IR Submitted for Peer Review)
- have attended all JBC CoD meetings
- attend the face to face meeting and colloquium/convention in full

In the event that a Centre does not receive funding to attend the face-to-face CoD meeting for any given year of the 3-year agreement, they are invited to attend however attendance will not be mandated. Additionally, an exemption will be made at the summative assessment for those Centres who did not receive funding to attend the face to face CoD meeting (in regards to that key performance requirement). The overall requirement of 90,000 points will be maintained over three years, but Centres will be able to flexibly adapt non-core activities to cover the required points missed due to non-attendance at CoD meetings.

### Clinical Partner Subscription

JBI Centres of Excellence can nominate to work with a designated hospital (i.e. single site) or health facility whereby that hospital will receive a complimentary subscription to JBI resources for the purpose of promoting and supporting an evidence based approach to policy and practice. Centres that choose to take up this opportunity must demonstrate the outcomes from this work. To be eligible to receive a complimentary subscription for a nominated clinical partner Centres must fill in the 'JBC Clinical Partner Engagement Form' expressing their intent to collaborate with a clinical partner (available on the JBC intranet). The clinical partner will then be contacted directly by Ovid to establish access to JBI databases and resources. This subscription will be valid until the end of the Centre's 3-year agreement with JBI. If the KPIs for 'Clinical Partner Engagement' (pg 11) are not met by the completion of the 3-year agreement, informed by the summative assessment, the complimentary subscription will be terminated. If the KPIs are met, and Centre of Excellence status is maintained, the subscription will be renewed for a further 3 years.

### Regional Chair

Centre Directors that serve as Regional Chair are eligible to receive AUD \$1,000 remuneration for their role. This funding is paid retrospectively following the timely submission of a Regional Annual Report, a Regional Operational Plan, and the agendas and minutes of all regional meetings by 31st January. Regions are welcome to appoint a co-chair who is Chair elect for the following year.

### JBI Colloquium

Centres that host a JBI Colloquium are eligible to receive AUD \$5,000 seed funding. This funding will be provided retrospectively following the successful completion of the colloquium.



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# Section 3: Meetings and Events

## Introduction

The Joanna Briggs Institute values the opportunity to meet with collaborators, subscribers and other key stakeholders to build relationships and collaborative engagement. It is important for JBI to ensure that we have strategies in place to build mutual understanding and to create cohesive teams at local, regional and international levels. As such, a range of meetings and events have been designed to meet this remit as outlined below.

## Committee of Directors meetings

The Committee of Directors (CoD) meet three times per year, twice by teleconference and once face to face, alternating biennially between Adelaide, Australia and the location of the biennial JBI Colloquium. Centre of Excellence Directors or their nominated proxy are required to attend all CoD meetings and biennial Colloquia in full. Centres are permitted to bring up to one (1) additional staff member to the meeting as an Observer free of charge. A fee of AU\$300pp applies to any additional attendees

Affiliated Groups are invited to attend the meeting as Observers at their own cost.

Additional Observers may also be invited to attend the CoD meeting at the discretion of the JBI Collaboration Support Unit.

Only Centre of Excellence Directors or their nominated proxy have the right of vote. Affiliated Group Conveners and other Observers have the right of audience and debate, but do not have voting rights, (unless invited to do so by the meeting Chair).

## JBI Colloquium

The JBI Colloquium is hosted by a JBI Centre of Excellence every second year. This event is an opportunity for the JBI and JBC to showcase activity and achievements internationally, to invite speakers from other prominent organisations in the field, to network and share experiences and knowledge around evidence synthesis, transfer and implementation. A full Committee of Directors meeting is hosted in conjunction with this event.

## JBC Regional Symposia and meetings

Regional symposia are encouraged as a means of furthering discussion and promotion of evidence informed approaches to the delivery of health policy and practice in their regions. They are not a mandated activity, rather they can be hosted by Centres of Excellence as an elective activity in the JBC Activity Matrix (pg. 12) as deemed appropriate and feasible by each region.

JBC Regional groups meet three times per year, twice by teleconference and once face to face, alternating biennially between Adelaide, Australia and the location of the biennial JBI Colloquium. Regional face to face meetings will take place as a part of the CoD business meeting. Each Regional Chair is responsible for organising two additional teleconferences with their region per annum, including agendas and minutes.



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# Section 4: Policies and Procedures

## Commercial Sponsorship

### Introduction

The intent of this policy is to ensure the independence of Joanna Briggs Institute (JBI) systematic reviews and implementation reports by making sure there is no bias associated with commercial conflicts of interest in their conduct.

JBI systematic reviews and implementation reports must be independent of conflicts of interest associated with commercial sponsorship and should be conducted by people or organisations that are free of such bias

The process for conducting JBI systematic reviews and implementation reports and the JBI groups and contributors responsible for producing reviews and reports should operate free from interference.

Users of JBI systematic reviews and implementation reports should be assured that they are produced in an independent manner.

### Policy

1. Commercial sponsorship of a JBI Systematic Review or Implementation Report is prohibited. Commercial sponsorship refers to funding provided by any for-profit manufacturer or provider of health care, or for any for-profit source with real or potential vested interest in the findings of a specific review. Government departments, not-for-profit medical insurance companies, health management organisations, research funding bodies, trust funds (whether associated with commercial entities or not) that provide funds using judgement of merit as determined by experts, for-profit companies that do not have real or potential vested interests in systematic reviews (e.g. banks, airlines) are considered non-commercial sources of potential sponsorship.
2. Commercial sponsorship for other activities, such as printing, advertising, conference support and support for outreach training programs, is acceptable subject to the following:
  - 2.1 sponsorship should not in any way influence the independence of the Institute
  - 2.2 A statement declaring that the sponsor(s) support of the activity has not influenced the content or outcome of the activity should be attached, in an appropriate way, to all information related to the activity
3. Authors of Joanna Briggs Institute systematic reviews and implementation reports should declare any financial support for the review or report, private clinical practice (if relevant), stocks, legal advice, consultancies, involvement in primary research in the subject area of their review, and any other 'competing interests' that they judge relevant.
4. Persons with a direct financial interest in a particular intervention should not be involved in a review of that intervention, either as review authors or peer reviewers.
5. Joanna Briggs Institute entities seeking (or currently in receipt of) sponsorship or support from sources that are classified as "non-commercial" in this policy (e.g. government departments, not-for-profit medical insurance companies; health management organisations; research funding bodies; trust funds (whether associated with commercial entities or not) that provide funds using judgement of merit as determined by experts; for-profit companies that do not have real or potential vested interests in systematic reviews such as banks, airlines) should establish that accepting such sponsorship does not compromise the integrity of the Institute; and should seek advice from the Institute in situations where this is uncertain.
6. Commercial sponsorship of any Joanna Briggs Institute activity by the tobacco industry or the arms trade is prohibited.
7. JBI systematic reviews (whether new or updates), protocols or implementation reports that do not meet the above requirements (1-6) from the inception of this policy will be withdrawn after consultation with the Editor in Chief.

## Use of the JBI and JBC Logo

### Introduction

The Joanna Briggs Institute (JBI) logo was designed when the Institute was established in 1996 and is representative of the JBI ethos and the dissemination of information internationally. The red pebble of knowledge and surrounding blue ripples are recognised internationally as the Institute's trademark and is used on all Institute publications, resources and promotional materials and symbolises the significant effect that dropping a single pebble can have.

### Policy

1. The Institute grants limited permission to Centres of Excellence and Affiliated Groups to utilise the JBI logo for the express purpose of promoting the Institute, its resources and activities.

The JBI logo may not be modified. In accordance with this policy, the following uses of the JBI logo will generally be permitted:

- On JBI endorsed educational materials
  - On documents and/or other materials designed to promote the vision and mission of the Institute (i.e. pamphlets, banners, user guides and other publications)
  - On all documentation pertaining to subscribers to the Institute
  - On all official JBI endorsement materials and associated promotion
  - On all internal communication with JBI entities
2. For all proposed uses of the JBI logo outside of those listed above, the permission of the Institute must be sought in advance in writing (letter, fax or e-mail) from the JBI Collaboration Support Unit. Please send us a sample of your document and indicate where you would like the logo to appear. Specifically, please note that the following uses will not be permitted:
    - Any use of the logo as a component of an organisation's own logo, trademark or other branding elements
    - Any use of the logo for the promotion or advertising of products, services and other activities intended to solicit business
    - Any use of the logo suggesting or implying a certification or seal of approval for activities, services and/or products
  3. The Institute grants express permission to Centres of Excellence and Affiliated Groups to utilise the Joanna Briggs Collaboration (JBC) logo for the purpose of promoting the Institute or the JBC, its resources or activities in line with this policy. The JBC logo may not be modified. In conducting regional or collaborative activities the JBC logo should be used.

## Intellectual Property Rights for Collaborating Entities

### Introduction

The Institute recognises the need for encouraging the practical application and economic use of the results of research carried by the institute and its collaborating entities for the benefit of the general public. The present Policy relates to the ownership, protection and commercial exploitation of Intellectual Property created by JBI collaborating entities in the course of their Agreement with JBI. Nothing in this Policy overrides provisions of prevailing national law.

1. Intellectual Property Rights means patents, trademarks, service marks, registered designs, copyrights, database rights, design rights, confidential information, applications for any of the above, and any similar right recognised from time to time in any jurisdiction, together with all rights of action in relation to the infringement of any of the above.
2. Collaborating Entities retain ownership to Intellectual Property Rights they have created prior to the Effective Start Date or independently of their Agreement with JBI and which it has made available for the performance of their Agreement.
3. Collaborating Entities grant the University of Adelaide an irrevocable, exclusive, fee-free licence to use the copyright in the Collaborating Organisation's Materials provided for the Collaborative Activities under their Agreement with JBI
4. The University of Adelaide grants Collaborating Entities a revocable, non-exclusive, fee-free licence to use the copyright in the JBI Materials, for the sole purpose of the Collaborative Activities during the Term of their Agreement.
5. Each Party will, in any publication containing information provided by the other Party, acknowledge the authorship of that information.
6. The Joanna Briggs Institute retains the intellectual property rights of the "Best Practice" series to enable and ensure that this information continues to be made freely available to practicing health professionals as widely as possible.

## Citing JBI materials

1. All publications of the Institute are cited in a conventional manner with originating authors. The only exception is the “Best Practice” series that is cited as being authored by The Joanna Briggs Institute (JBI).

### For example:

#### Books:

Pearson A, Field J, Jordan Z. Evidence-Based Clinical Practice in Nursing and Health Care. Oxford, United Kingdom: Blackwell Publishing, 2006.

#### Journal articles:

Jayasekara R, Schultz T. The feasibility and appropriateness of introducing nursing curricula from developed countries into developing countries: a comprehensive systematic review. *Int J Evid Based Healthc* 2006; 4(3):208–220

#### Best Practice Information sheets:

Joanna Briggs Institute. Topical skin care in aged care facilities. Best Practice: evidence based information sheets for health professionals. 2007; 11(3):1-4.

#### Evidence Summaries/Recommended Practices:

Kavanaugh, S (2010) Care of the patient with severe facial burns – Topical Ointment / Cream, Recommended Practice, JBI COnect+, <http://connect.jbiconnectplus.org/ViewDocument.aspx?0=2527> [Accessed 22/04/10]

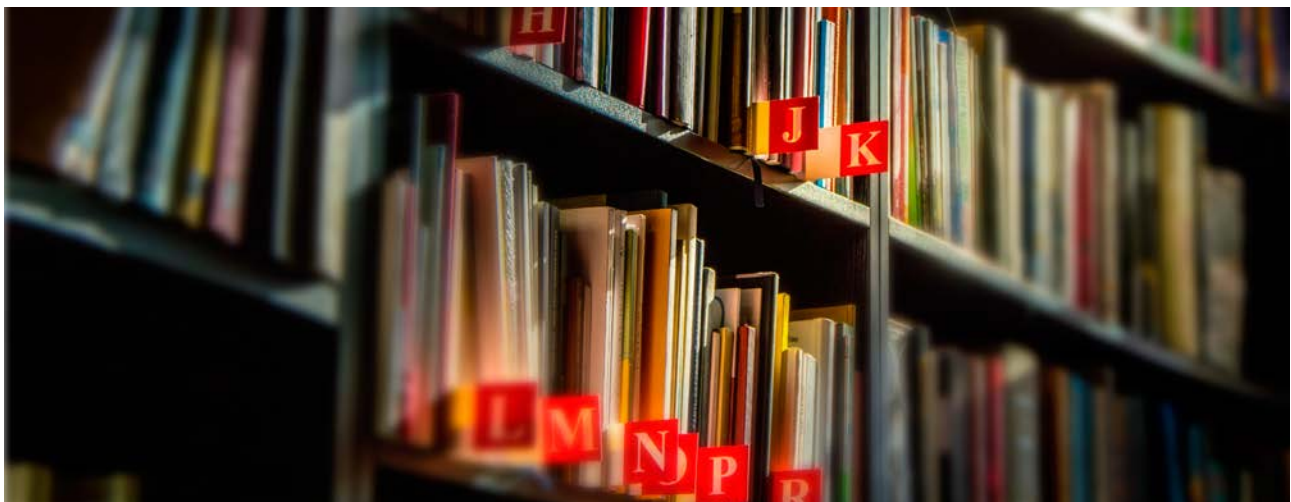
1.5 Lippincott Book Series:

1.6 A page on the JBI Website:

Authors. Page title. Website address (url) (accessed day month year)

### For example:

Joanna Briggs Institute. About. <http://joannabriggs.org/about.html> (accessed 1 February 2015)



# JBI CS RTP and EBCFP Train the Trainer Programs

## Trainer Accreditation

### Introduction

An intrinsic part of the Joanna Briggs Institute (JBI) approach is evidence transfer, including education and training. The Joanna Briggs Institute has developed two core education programs as follows:

- The JBI Comprehensive Systematic Review Training Program (CS RTP)
- The JBI Evidence Based Clinical Fellowship Program (EBCFP)

Each program also has an associated Train the Trainer (TtT) program, designed to ensure maximum potential is reached across the global community. The international implementation of these two programs speaks to the Institute's ability to achieve its broader vision and mission. This Policy outlines the eligibility requirements for achieving and maintaining trainer accreditation for both programs.

### CS RTP TtT Trainer Accreditation Policy

1. JBI Centre of Excellence or Affiliated Group core staff who wish to enrol in the JBI Comprehensive Systematic Review Train the Trainer Program from the start of 2017 (who are not an accredited trainer already) must:
  - 1.1 Be a registered core staff member of a JBI Group or Centre.
  - 1.2 Have undertaken the JBI CSR Training Program in the last two years or must have completed and had published a systematic review in the JBI Database of Systematic Reviews and Implementation Reports using the JBI software (JBI SUMARI).
2. The Fee Structure for the CS RTP TtT is as follows:
  - 2.1 When run in Adelaide:
    - Part 1: \$500AUD (includes access to all online modules and payable in advance irrespective of whether Part 2 is completed or not)
    - Part 2: \$1000AUD
  - 2.2 When run Overseas:
    - Part 1: \$500AUD (includes access to all online modules and payable in advance irrespective of whether Part 2 is completed or not)
    - Part 2: \$1500AUD
- 2.3 Centres are able to set their own fee structure for running training courses, and as such it is anticipated that centres will be able to recoup the costs of this investment within the first year of running training.
- 2.4 A minimum of 5 participants is required for this program.
- 2.5 Staff in low-income economies (as determined by the World Bank) will not be charged these fees.
3. To remain accredited JBI trainers must conduct CS RTP at least once per year and successfully complete Trainer reaccreditation activities every two years or as required by JBI (for example training and accreditation knowledge assessment may be required if JBI changes its course, course format, software or introduces new software). These activities may consist of a multiple choice questionnaire, participation in an online forum, or the attendance/ viewing of a webinar/educational videos. Refer to the 'JBI Trainer's Agreement' for more information.

### Procedures

1. The participant enrolls into the train-the-trainer program;
2. The participant completes the online TtT exam and courses (Part 1 TtT);
3. If the participant passes Part 1, the participant can enrol and attend the structured face-to-face TtT accreditation program (Part 2 TtT); and
4. If the participant passes Part 2, they are eligible to become a JBI accredited trainer.



## EBCFP TtT Trainer Accreditation Policy

1. Any JBI Centre of Excellence or Affiliated Group core staff are eligible to enroll in the JBI CFP TtT program from the start of 2017 (who are not an accredited trainer already).
2. The Fee Structure for the EBCFP TtT is as follows:
  - 2.1 When run in Adelaide:
    - Part 1: \$500AUD (includes access to all online modules and payable in advance irrespective of whether Part 2 is completed or not)
    - Part 2: \$1000AUD
  - 2.2 When run Overseas:
    - Part 1: \$500AUD (includes access to all online modules and payable in advance irrespective of whether Part 2 is completed or not)
    - Part 2: \$1500AUD
  - 2.3 Centres are able to set their own fee structure for running training courses, and as such it is anticipated that centres will be able to recoup the costs of this investment within the first year of running training.
  - 2.4 A minimum of 5 participants is required for this program.
  - 2.5 Staff in low-income economies (as determined by the World Bank) will not be charged these fees.
3. To remain accredited JBI trainers must conduct the EBCFP at least once per year and successfully complete Trainer reaccreditation activities every two years or as required by JBI (for example training and accreditation knowledge assessment may be required if JBI changes its course, course format, software or introduces new software). These activities may consist of a multiple choice questionnaire, participation in an online forum, or the attendance/ viewing of a webinar/educational videos. Refer to the 'JBI Trainer's Agreement' for more information.

## Procedures:

1. The participant enrolls into the train-the-trainer program
2. The participant completes the online TtT exam and courses (Part 1 TtT)
3. If the participant passes Part 1, the participant can enrol and attend the structured face-to-face TtT accreditation program (Part 2 TtT)
4. If the participant passes Part 2, they are eligible to become a JBI accredited CFP trainer.



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