Establishing An Epic User Group

Peer to Peer, Elbow to Elbow. Epic.
“Focused on products, technologies, applications, and industries, user groups offer an environment for all customers to network, share information and best practices” - Oracle

**User Group:** A set of people who have similar interests, goals, or concerns, and are usually devoted to a particular technology, application, or corporation, such as Epic. The members have regular meetings where they can share their ideas and, ideally, the members live in the same geographic area so they can meet in person.

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**THE BENEFITS OF AN EPIC USER GROUP**

Epic User Groups provide a variety of benefits to their participants. These “local,” state-wide, or regional groups:

1. Share experiences and best practices in the use of IT, increasing value to your organization and to the healthcare industry.
2. Solve problems through networking with other members and draw on collective knowledge to improve your business.
3. Provide networking opportunities and the exchange of ideas and strategies among users.
4. Enhance user understanding of Epic products, services, and related technologies, third party business partners, and future direction.
5. Provide a collective voice relative to Epic’s suite of offerings.

Another value of a local user group is a lower cost of participation. It isn’t always financially feasible for Epic-implemented organizations to send their staff to UGM in Verona each September. Though a much smaller event, a local user group forum or conference of local organizations provides value at a significantly lower cost.

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**ESTABLISHING AN EPIC USER GROUP**

There are three primary approaches to establishing user groups – informal, formal, and a combination of the two. There is no “right” way to launch a new user group. The approach is determined entirely by the participating organizations, which may elect to begin as an informal gathering and evolve to a more formal organization.

“The Minnesota Epic User Group has been invaluable as the member organizations have implemented and optimized Epic. Through the Special Interest Groups (SIGs) and the bi-annual conferences, we have had many opportunities to learn about Epic’s latest functionality and share “lessons learned” from one organization to another. It is also a great way for our staff to network with others in similar positions, and know who to contact for specific questions or issues. Lastly, the support provided for “Go-Lives” is fantastic and allows the new organizations to get reasonably priced expertise as they move onto Epic.”

- Joanne Sunquist, SVP & CIO, HealthEast Care System
ESTABLISHING AN EPIC USER GROUP (continued)

Financial models also vary ranging from 100% self-funded by the participating organizations, to individual participation fees, to vendor funded user groups. In addition, user groups can be established as either profit or non-profit organizations.

The key is to establish a user group that will ensure long-term viability. The most common issue for a user group is to have a strong beginning but then disintegrates over time because of a lack of structure, organization, and management. Intentions are always good and enthusiasm high, but the day to day challenges of keeping a group intact requires more time and attention than most healthcare executives and staff have the time to manage.

Option 1: Informal User Group

An informal group is often similar to a very large special interest group. It may include periodic meetings and events in which participants share presentations and discussions based upon personal or group interest. Though an informal user group requires some form of leadership and decision-making ability, it does not require a legal entity, bank account, or structured governance. Meetings may be sponsored by a single healthcare organization, or meetings may be conducted rotationally – in that each member takes their turn sponsoring a meeting. Fees may or may not be charged to attend the meetings. An informal group is an excellent way to start a user group, but if not grown to a formal model, sometimes falls apart because of other priorities of the members.

Option 2: Formal User Group

A formal user group is a joint venture among multiple healthcare organizations that have common interests in advancing their use and success with Epic. It is typically a legal entity that includes a Board of Directors, Articles of Incorporation, Bylaws, Policies, and bank account. All participating organizations share equal responsibility and decision-making to ensure its success and establishes a financial model that sustains the organization long-term.

Creating, launching, or formalizing a User Group needs to be treated as a project and includes several phases and deliverables. Like any other project the development and launch of a formal user group:

- Requires Logical / Managed Approach
- Includes Multiple Process Phases
- Creates Deliverables in Each Phase
- Defines Roles & Responsibilities
- Requires Governance & Documentation

Creating a formal user group requires the commitment of each participating organization to attend planning meetings, make financial decisions, and work in partnership with their local competitors. When establishing a formal entity, it is imperative that each participating organization has an equal voice and an equal vote throughout the decision-making process.

“The actual structure of a user group can vary greatly - from a small number of friends and coworkers meeting informally in the evening, to a large group of companies based in the same geographic area.”

- Sun Developer Network

“The value has come in the ability to network with other health systems and discuss issues related to Epic modules and also healthcare in general. Our Sanford teams have also benefited from the individual SIG meetings and it has been a good opportunity for our teams to present their accomplishments and also learn from other members of the group.”

- Dennis Hofer, Chief Application Officer/VP, Sanford Health
Option 3: Begin Informally & Evolve

A user group may want to combine Option 1 & 2, beginning as an informal meeting of interested participants and evolving over time to a more formal group. If employing this approach, it is important to define the criteria for participation and whether there is a cost to participate. Establishing a few basic guidelines will assist in preventing miscommunications and issues as the group evolves. With this approach, it is also helpful to establish a timeframe to assess the user group and determine if it is providing the expected benefit(s) to participants and whether there is interest in formalizing the group.

The four pieces of a successful Epic User Group: Learning, Sharing, Bragging, and Networking.

“Networking with peer organizations has proved to be the most value. Networking occurs through our semi-annual conferences, through our twenty-some Special Interest Groups (SIGs), through interactions between our Board members, or simply by picking up the phone or sending an email to another member who might have experience or knowledge in a topic of interest. As an Epic User Group we are also able to leverage our ten member status to approach Epic about issues or ideas of common interest. Similarly we are able to use the resources of the ten members to tackle strategic initiatives of mutual interest (e.g. establishment of go-live support for members).”

- Pat Taffe, CIO, North Memorial Health Care
About RAIN Resources

RAIN Resources, LLC, is a boutique consulting firm located in Minnesota. Since 2004, RAIN has provided senior level experienced consultants to healthcare organizations that are training, implementing, and supporting Epic applications. RAIN’s key areas of Epic expertise are:

- Go-Live Support
- User Group Development
- Project & Program Management
- Curriculum Development & Training

RAIN provides User Group Development services on a “menu” basis, allowing the user group to determine which services are needed for their particular group. Services include, but are not limited to:

- Defining Interest & Requirements of Healthcare Organizations
- Establishing Governance Entities & Governance Documents
- Defining User Group Special Interest Groups, Work Groups, Project Groups, etc.
- Managing & Facilitating Meetings
- Providing Administrative Services
- Planning & Managing Meetings & Conference Events
- Establishing & Managing Vendor Programs

To learn more about RAIN Resources services, please contact Cheryl Swanson, Founder & Owner of RAIN Resources, LLC: cswanson@rainresources.com or go to our website: www.rainresources.com.