

SECTION 1 — GENERAL INFORMATION

DIRECTIONS

This self-assessment can be used as a tool to estimate the extent to which you and your team have addressed important issues that can affect the success of your cross-jurisdictional sharing (CJS) initiative. This assessment can be taken individually by members of the CJS team, or as a team to stimulate a group discussion about the questions being asked.

The assessment includes a series of statements. Please indicate your level of agreement or disagreement with each statement. Using the scoring instructions provided, assign scores to each section and phase. You can then compare your responses to those of other team members and identify areas of relative strength and need.

Please note that the scores are not meant to be used as a “pass-or-fail” threshold. They are just a way to point out potential areas of disagreement among team members and organizations and to show a comparison of the strength of each phase of the CJS initiative.

SCORING INSTRUCTIONS

Please assign values using the formula below:

- Completely Agree = 4 points
- Somewhat Agree = 3 points
- Somewhat Disagree = 1 point
- Completely Disagree = 0 points

Please assign values using the formula below:

- Completely Agree = 4 points
- Somewhat Agree = 3 points
- Somewhat Disagree = 1 point
- Completely Disagree = 0 points

SECTION 2 — QUESTIONS FOR PHASE ONE: EXPLORE

WHY would you consider a CJS arrangement?

- Q2.1: We agree upon the issues or concerns that need to be addressed.
- Q2.2: We have discussed how the solutions to the issues can be found through internal management activities or reallocation of existing resources.
- Q2.3: There is agreement that a CJS effort will likely help solve the issues being addressed.
- Q2.4: There is an agreement about what the goals of the CJS initiative being considered are.

Score

Score for this area **0**

WHAT services and capacities would be shared? What would be the scope of the agreement?

- Q2.5: There is a shared understanding of what the public health services currently offered by each jurisdiction are.
- Q2.6: We have discussed the CJS agreements currently in place are (if any) and what we can learn from them.
- Q2.7: There is an agreement about what service gaps are to be filled by a CJS arrangement.
- Q2.8: We have discussed all of the potential areas of sharing that should be considered, such as:
 - Functions (e.g., billing, HR, IT)
 - Programs (e.g., WIC, environmental health)
 - Capacity (e.g., epidemiology, lab)
- Q2.9: We agree about the issues that should NOT be considered because of lack of support. We know what the boundaries are of this initiative that should not be trespassed.

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Score for this area **0**

Please assign values using the formula below:

- Completely Agree = 4 points
- Somewhat Agree = 3 points
- Somewhat Disagree = 1 point
- Completely Disagree = 0 points

SECTION 2 (continued) — QUESTIONS FOR PHASE ONE: EXPLORE

WHO should be involved? Who are appropriate partners?

- Q2.10: There is an awareness of the history of relationships among the jurisdictions affected by this effort.
- Q2.11: It is clear what the motivations of each key partner are.
- Q2.12: We have explored the political willingness among stakeholders and those affected by the issue to consider CJS as a possible solution. They have an idea of the feasibility of a CJS option.
- Q2.13: The partners agree upon the guiding principles that a CJS effort would have.
- Q2.14: We are aware of other individuals and groups which the issues of concern affect and how.
- Q2.15: The model of sharing being considered has the support of stakeholders and those affected by the CJS initiative.

Score for this area **0**

TOTAL SCORE FOR PHASE ONE (Explore) 0

SECTION 3 — QUESTIONS FOR PHASE TWO: PREPARE AND PLAN

Context and history

- Q3.1: We have examined the possible strengths-weaknesses-opportunities-threats (SWOT) in considering the development of the new initiative's action plan.
- Q3.2: We have thought about and discussed what can be learned from past CJS initiatives.

Score for this area **0**

Governance

- Q3.3: We are clear about what the governance options being considered for the new CJS agreement are.
- Q3.4: We have a plan for an organizational structure adequate to assure proper management.

Score for this area **0**

Please assign values using the formula below:

- Completely Agree = 4 points
- Somewhat Agree = 3 points
- Somewhat Disagree = 1 point
- Completely Disagree = 0 points

SECTION 3 (continued)— QUESTIONS FOR PHASE TWO: PREPARE AND PLAN

Fiscal and service implications

- Q3.5: Our plan should achieve a balance between increasing efficiency and effectiveness.
- Q3.6: We have a plan for existing and potential funding streams that can assure adequate and sustainable operational funding.
- Q3.7: Public health essential services will be provided in a manner that meets or exceeds current levels of performance.
- Q3.8: We have identified issues related to uneven levels of local taxation.

Score for this area 0

Legal sharing agreement

- Q3.9: We agree upon what kind of agreement will serve as the basis for the CJS initiative.
- Q3.10: We are clear about who will have the authority to make decisions.
- Q3.11: We are clear about who will have the authority to allocate resources.

Score for this area 0

Legal issues

- Q3.12: We have identified any issues related to personnel and vendor contracts (e.g., benefits, collective bargaining agreements, procurement processes, etc.).
- Q3.13: We are aware of the liability and insurance issues to be addressed.

Score for this area 0

Logistical issues

- Q3.14: We have a plan for addressing the logistical implications of the new agreement for buildings, office space, transportation, other properties, etc.
- Q3.15: There are adequate facilities to house all personnel, equipment and programs within reasonable geographical proximity to the customers for the shared services.

Score for this area 0

Please assign values using the formula below:

- Completely Agree = 4 points
- Somewhat Agree = 3 points
- Somewhat Disagree = 1 point
- Completely Disagree = 0 points

SECTION 3 (continued)— QUESTIONS FOR PHASE TWO: PREPARE AND PLAN

Communications

- Q3.16: We have a specific plan for how the partners will communicate.
- Q3.17: We have thought about external audiences with whom the partners also should communicate.
- Q3.18: We have a plan for communicating with external audiences.
- Q3.19: We have a formal strategic communications plan.

Score for this area **0**

Change management

- Q3.20: We have some idea of what changes will occur as a result of the CJS arrangements.
- Q3.21: We are aware of who will be affected.
- Q3.22: We have a plan for how these changes will be managed.

Score for this area **0**

Timeline

- Q3.23: There is a specific timeline including specific steps to be taken.

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Score for this area **0**

Monitoring

- Q3.24: We have a plan for knowing if the CJS initiative is successful.
- Q3.25: We have discussed with partners how they will measure success.

Score for this area **0**

TOTAL SCORE FOR PHASE TWO (Prepare and Plan) 0

Please assign values using the formula below:

- Completely Agree = 4 points
- Somewhat Agree = 3 points
- Somewhat Disagree = 1 point
- Completely Disagree = 0 points

SECTION 4 — QUESTIONS FOR PHASE THREE: IMPLEMENT AND IMPROVE

Implementation and management

- Q4.1: The CJS activities have been, and are being, implemented as planned.
- Q4.2: There is a strong project management team in place.
- Q4.3: Senior-level support has been secured.

Score for this area 0

Communications and change management

- Q4.4: The change management and communications plans have been implemented as planned.
- Q4.5: Communications between all parties is working well.
- Q4.6: We have identified specific concerns and communications needs of each group affected by the new initiative.

Score for this area 0

Monitoring and improving

- Q4.7: The results of the CJS process have been positive and satisfactory.
- Q4.8: The level of satisfaction of the stakeholders and groups affected by the initiative is high.
- Q4.9: The goals of improved effectiveness and efficiency are being achieved.
- Q4.10: Adjustments have been made to the plan since beginning.
- Q4.11: There is a need to revise the initiative’s goals at this point in the process.
- Q4.12: The knowledge that has been acquired is being shared with the project team and other stakeholders.

Score for this area 0

TOTAL SCORE FOR PHASE THREE (Implement and Improve) 0

SECTION 5 —SUMMARY

Record your results below.

A: Phase	B: Score	C: Mamimum Possible Score	D: Percent Achieved (B/C*100)
Phase One: Explore		60	
Phase Two: Prepare		100	
Phase Three:		48	