

A Roadmap to Sharing Agreements



Center for Sharing Public Health Services

Rethinking Boundaries for Better Health

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Cross-Jurisdictional Sharing Spectrum

Informal and Customary Arrangements	Service Related Arrangement	Shared Functions with Joint Oversight	Regionalization
<ul style="list-style-type: none"> • “Handshake” • MOU • Information sharing • Equipment sharing • Coordination 	<ul style="list-style-type: none"> • Service provision agreements • Mutual aid agreements • Purchase of staff time 	<ul style="list-style-type: none"> • Joint projects addressing all jurisdictions involved • Shared capacity • Inter-local agreements 	<ul style="list-style-type: none"> • New entity formed by merging existing LHDs • Consolidation of 1 or more LHD into existing LHD

Definitions

- *Cross-jurisdictional sharing* is the **deliberate exercise** of public authority to **enable collaboration across jurisdictional boundaries** to deliver essential public health services.
- *Collaboration* means working across boundaries and in multi-organizational arrangements to solve problems that cannot be solved – or easily solved – by single organizations or jurisdictions.*

*Source: Rosemary O'Leary, School of Public Affairs and Administration, University of Kansas

Factors for Success

◆ Prerequisites

- ◆ Clarity of objectives
- ◆ A balanced approach (mutual advantages)
- ◆ TRUST!

◆ Facilitating factors

- ◆ Success in prior collaborations
- ◆ A sense of “regional” identity
- ◆ Positive personal relationships

◆ Project characteristics

- ◆ Senior-level support
- ◆ Strong project management skills
- ◆ Strong change management plans
- ◆ Effective communication

- Sources:

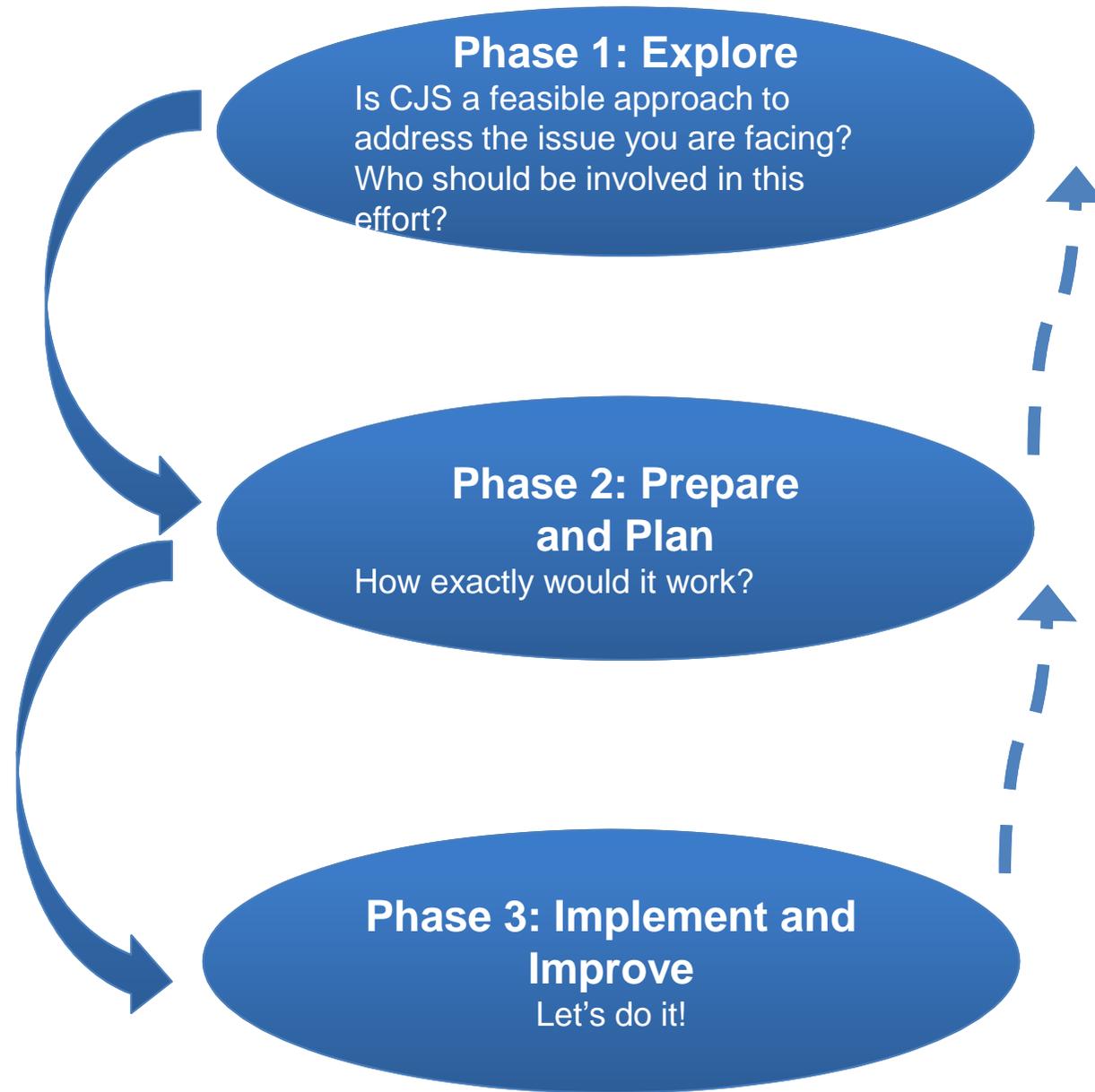
- Rosemary O’Leary, School of Public Affairs and Administration, University of Kansas
- IBM Center for the Business of Government
- Bruce Miyahara and Patrick Libbey
- CSPHS demonstration sites



So How Do We Do It?

- ◆ *A roadmap to develop cross-jurisdictional sharing (CJS) initiatives*
 - ◆ Developed by the CSPHS
 - ◆ Based on what we have learned from your projects (and other published material)
 - ◆ See handout
 - ◆ Also available at:
<http://www.phsharing.org/roadmap/>
- ◆ Used in this meeting as a common framework for discussion and learning

The
Three
Phases



Phase 1: Explore

Is CJS a feasible approach to address the issue you are facing? Who should be involved in this effort?

Areas	Examples of Issues to Consider
Goals and expectations: WHY would you consider CJS?	<ol style="list-style-type: none"> 1) What is the issue that needs to be addressed? 2) Is CJS likely to help solve the issue being addressed? 3) What are the goals of the CJS initiative being considered?
Scope of the agreement: WHAT services and capacities would be shared?	<ol style="list-style-type: none"> 1) What are the PH services currently offered by each jurisdiction? 2) What are the CJS agreements currently in place? 3) What are the service gaps to fill? 4) What could be considered for sharing? <ol style="list-style-type: none"> a) Functions (e.g., billing, HR, IT) b) Programs (e.g., WIC, environmental health) c) Capacity (e.g., epidemiology, lab) 5) What issues should NOT be considered because of lack of support? What are the boundaries of this initiative that should not be trespassed?
Partners and stakeholders: WHO are the partners that should be involved? What is the history of their relationships?	<ol style="list-style-type: none"> 1) What are the motivations of each key partner? 2) What are the guiding principles that the CJS effort would have? Do all the partners share these principles? 3) What other individuals and groups does the issue affect, and how?

Phase 2: Prepare and Plan

How exactly would it work? (1 of 2)

Areas	Examples of Issues to Consider
Context and history	<ol style="list-style-type: none">1) What are the strengths, weaknesses, opportunities and threats?2) What can be learned from past CJS initiatives?
Governance	<ol style="list-style-type: none">1) What are the governance options being considered for the new CJS agreement? Is there at least one governance option that could be acceptable to everybody?2) What is an organizational structure adequate to assure proper management?
Fiscal and service implications	<ol style="list-style-type: none">1) Does the plan achieve a balance between increasing efficiency and effectiveness?2) Will public health essential services be provided in a manner that meets or exceeds current levels of performance?
Legal sharing agreement	<ol style="list-style-type: none">1) What kind of agreement will be at the base for the CJS initiative?2) Who will have the authority to make decisions?3) Who will have the authority to allocate resources?
Legal and personnel issues	<ol style="list-style-type: none">1) Are there issues related to personnel and vendor contracts (e.g., benefits, collective bargaining agreements, procurement processes, etc.)?2) Are there any liability and insurance issues to be addressed?

Phase 2: Prepare and Plan

How exactly would it work? (2 of 2)

Areas	Examples of Issues to Consider
Logistical issues	<ol style="list-style-type: none">1) What are the implications of the new agreement for buildings, office space, transportation, other properties, etc.?2) Are there adequate facilities to house all personnel, equipment and programs within reasonable geographical proximity to the customers for the shared services?
Communications	<ol style="list-style-type: none">1) How will the parties communicate?2) Are there external audiences with whom the partners also should communicate? If so, is there a strategic communications plan in place?
Change management	<ol style="list-style-type: none">1) How are the changes produced by the CJS initiative going to be managed?<ul style="list-style-type: none">▪ Who will be affected by the changes?▪ Who is going to want this initiative?▪ Who is going to oppose it?▪ Who has the most to gain?▪ Who has the most to lose?2) What is the change management plan for this initiative?
Timeline	<ol style="list-style-type: none">1) Is there a timeline including specific steps that have to be taken for the success of the sharing initiative?
Monitoring	<ol style="list-style-type: none">1) How would you know if the CJS initiative is successful?2) Who will monitor the implementation and results of the CJS initiative?3) What measures will be used to assess the results of the initiative?

Phase 3: Implement and Improve

Let's do it!

Areas	Examples of Issues to Consider
Implementation and management	<ol style="list-style-type: none">1) Are the activities being implemented as planned?2) Is there a strong project management team in place?3) Is senior-level support being secured?
Communications and change management	<ol style="list-style-type: none">1) Are the change management and the communications plans being implemented?2) Are communications among all parties affected flowing well?3) What are the specific concerns and communications needs of each group affected by the new initiative?
Monitoring and improving	<ol style="list-style-type: none">1) Are the results of the activities satisfactory?<ul style="list-style-type: none">▪ Is the level of satisfaction of the stakeholders and groups affected by the initiative high?▪ Are the goals of improved effectiveness and efficiency being achieved?▪ Is there a need to revise the initiative's initial goals?▪ What are the adjustments that need to be made to the plan?2) Is the knowledge acquired being shared within and outside the project team?

OVERVIEW: A ROADMAP TO DEVELOP CROSS-JURISDICTIONAL SHARING INITIATIVES

Select a link to access tools and resources

	Areas	Examples of Issues to Consider	Tools and Resources
Phase One: Explore	Goals and expectations: WHY would you consider CJS?	<p>What is the issue that needs to be addressed?</p> <p>Can the solutions to the issue be found through internal management activities or reallocation of existing resources?</p> <p>Is CJS likely to help solve the issue being addressed?</p> <p>What are the goals of the CJS initiative being considered?</p>	<p>Resources</p>
	Scope of the agreement: WHAT services and capacities would be shared?	<p>What are the public health services currently offered by each jurisdiction?</p> <p>What are the CJS agreements currently in place? What can we learn from them?</p> <p>What are the service gaps to fill?</p> <p>What could be considered for sharing?</p> <p>a) Functions (e.g., billing, HR, IT)</p> <p>b) Programs (e.g., WIC, environmental health)</p> <p>c) Capacity (e.g., epidemiology, lab)</p> <p>What issues should NOT be considered because of lack of support? What are the boundaries of this initiative that should not be trespassed?</p>	<p>Resources</p> <p>Tools:</p> <ul style="list-style-type: none"> • Assessment of Existing Services • Assessment of One CJS Arrangement • Assessment of Existing CJS Arrangements: Detailed Survey • Assessment of Existing CJS Arrangements: Abbreviated Survey
	Partners and stakeholders: WHO are the partners that should be involved?	<p>What is the history of relationships among the jurisdictions affected by this effort?</p> <p>What are the motivations of each key partner?</p> <p>Is there political willingness among stakeholders and those affected by the issue to explore CJS as a possible solution? Is CJS a feasible option?</p> <p>What are the guiding principles that the CJS effort would have? Do all the partners share these principles?</p> <p>What other individuals and groups does the issue affect, and how?</p> <p>Is the model being considered feasible? Will it have the support of stakeholders and those affected by the CJS initiative?</p>	<p>Resources</p> <p>Tools:</p> <ul style="list-style-type: none"> • Collaborative Trust Scale



Your Turn

Share your experience in this journey

- Do these steps resonate with your experience?
- Do you have examples of actions or products related to specific phases in the roadmap?
- Do you have suggestions on how to make this roadmap more useful?





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