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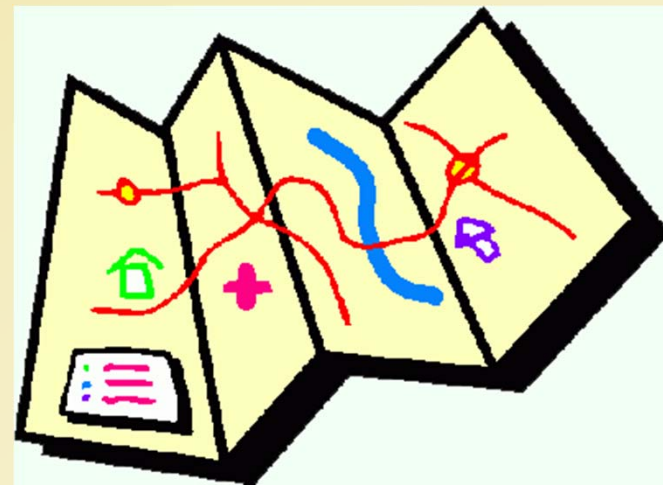
Cross-Jurisdictional Service Sharing: What Makes it Work?



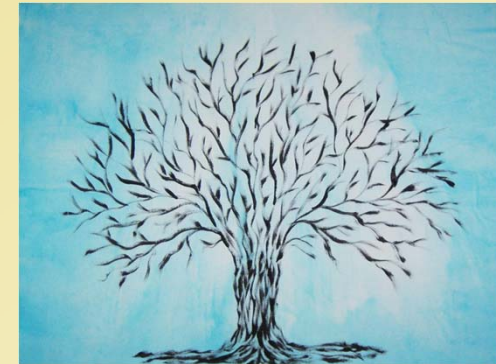
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Road Map

- Overview of cross-jurisdictional service sharing models
- Motivations for service sharing
- Lessons learned
 - Public health
 - Government
 - Business



Sources of Information



- White papers and journal articles
 - Pat Libbey
 - Numerous presentations and discussions
 - Nancy Kaufman
 - Regionalization of Government Services: Lessons Learned, 2010
 - IBM Center for the Business of Government
 - Success Factors for Implementing Shared Services in Government, 2008
 - Pioneer Institute
 - Case Studies of Success and Failure in Massachusetts (2008)
- Research experience in Massachusetts



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 |

Why change?



Motivations for Service Sharing

- To improve quality and breadth of services
- To manage costs
- To improve organizational efficiency
- To create equity in access to public services
- Mandated by a higher level agency

How did you get here?



Relationships

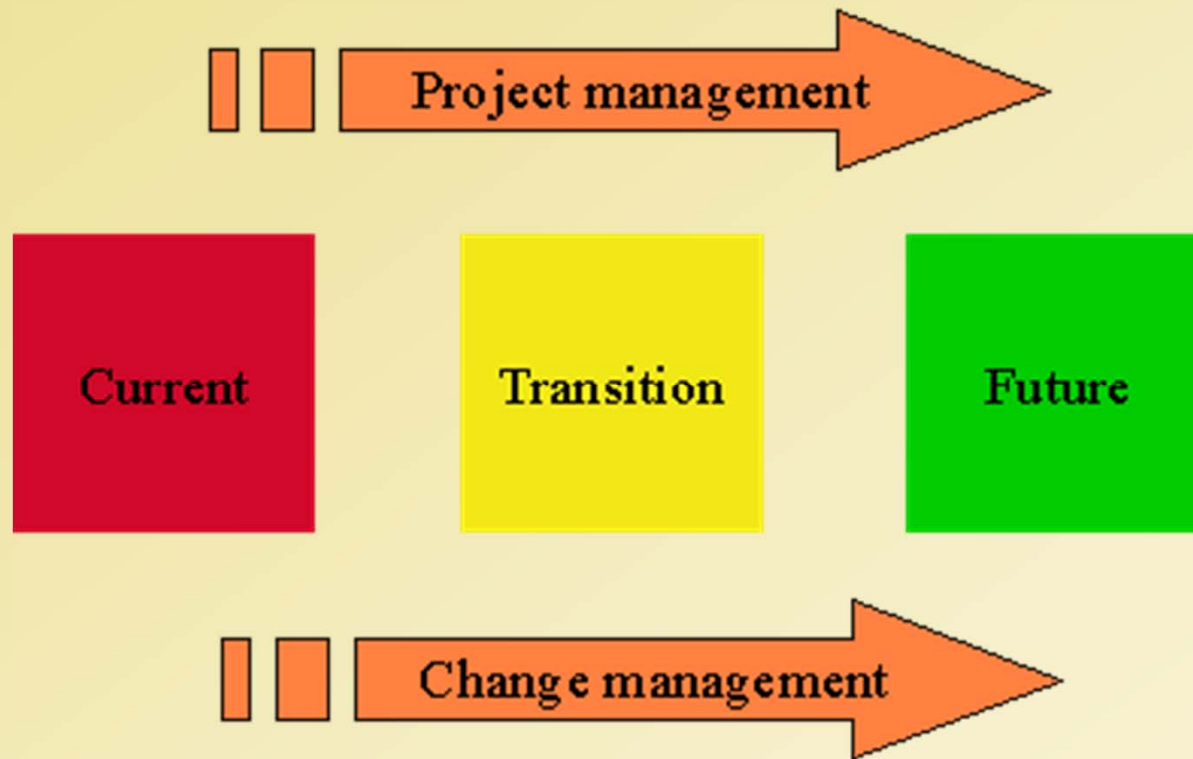


- Foundational to collaborative work
- Understand history of relationships between stakeholders within and across jurisdictions
 - Previous work together
 - Experiences with previous work
- Invest time upfront getting to know each other
 - Individuals
 - Jurisdictions

Relationships

- Identify and discuss organizational and political cultures across jurisdictions
- Assess extent to which you share similar values, goals for sharing services
- Realize you need to work toward goal alignment

Develop a Change Management Strategy



Core Components of a Change Management Process

| | |
|-------------------------|--|
| Assessment | Willingness, readiness, and capacity of individuals and organizations to change |
| Plan Development | Establish goals, intended outcomes, strategy for achievement, project management, governance |
| Implementation | Roll out your plan; monitor process and outcomes |
| Evaluation | Reflect at critical junctures of process; make changes as needed |



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"Building sustainable community health, together"

Assess Readiness, Willingness, and Capacity to Change

- How will key stakeholders be impacted by service sharing?
 - Public health – director, staff
 - Policy makers – elected officials, board of health
 - Public – residents in all jurisdictions
- What are their key concerns?

Senior-Level Support is Critical



Identify a champion for the work in every jurisdiction involved

- Champion needs to be credible among multiple stakeholders
- Help ensure appropriate financial and human resources for service sharing
- Identify what information they need to advocate on behalf of service sharing project
 - Champions also need to know what project managers need to carry out the service sharing plan

Strive for Transparency

- Understand perceptions of proposed change
 - How do they vary by stakeholder group?
- Be honest about concerns that may be real
- Identify “deal breakers” for different stakeholders
 - Keep these in mind as you begin planning
- Identify and engage key people to participate in planning process
 - Decision-makers
 - Connectors
 - Strategists



Create Channels for Communication

- Develop a communication strategy early in the planning process
 - Consider all stakeholders
 - May need specific strategies for different stakeholders
 - Who delivers information?
 - How is information communicated?
 - When or how often is information communicated?

Create Channels for Communication

- Match communication strategy with need
 - Electronic communication strategies can help push information out
 - Meeting notifications
 - Meeting minutes
 - Updates on progress towards goals
 - In-person communication is essential for deliberation and decision-making



Establish Goals for Service Sharing

- Clarity of purpose is essential
 - Recognize there may be different goals for each stakeholder group



- Goals should:
 - explicitly state values or improvements of importance to stakeholders
 - be measurable
 - be time specific



Identify Indicators of Success

- How will you know if your change is successful?
- What is important to different stakeholder groups?
- Know where you stand today so you can appreciate where you are tomorrow
 - Dedicate resources to gather and assess information associated with key indicators



Create a Project Management Strategy

- Project management team with clear leadership
 - Dedicated time and resources to implement plan
- Project management time will vary by scope of shared service arrangement
- Define roles and responsibilities for members of project management team
 - Reporting and communication channels
 - Constituent focus
 - Identify benchmarks and articulate expectations



Identify an Appropriate Implementation Strategy

- Incremental change vs. full implementation
- Create clearly defined action steps
 - These may change over time, but you need a road map for everyone involved to follow
- Communicate your plan to stakeholders

Do You Need a Governance Structure?

- As the number of services shared increases, so will the need for a governance structure
- Goal is to create mutual ownership, shared responsibility, long-term support
- Range of informal to formal structures, depending on need
 - Advisory to Representative boards

Governance Boards

- Who serves on governance board?
 - Ideally equal representation of jurisdictions involved
 - Mix of stakeholders
- How will you work together?
 - Agree upon how decisions will be made
 - Delineate roles, responsibilities, expectations
 - Develop and communicate systems of accountability
 - Create opportunities for active participation



Implement Your Plan

- Invite feedback and input during early stages to inform improvements
- Monitor implementation
 - Are things going as planned?
- Track progress
 - Keep in mind all stakeholders
- Expect non-linear progress at first
 - Mistakes will be made
 - Deal with them directly and immediately



Evaluate Your Progress



- Assess progress towards intended goals
- Ask stakeholders about their experiences
- Identify lessons learned
- Make needed adjustments
- Continue the work!



Change Cycle

Forming

Team members agree to come together
Lots of uncertainty
May be skeptical about work
Trust may not be earned yet

Storming

Deliberation & disagreement
Agree upon goals
Develop plans
Make decisions

Norming

Put the plan in motion
Learn what works
Build trust over time

Performing

Change is implemented
On-going assessment
Communication
Governance

Leadership,
Teamwork,
Commitment



Challenges to service sharing unique to public services

- A lack of up-front investment in time and resources needed to plan for, implement, and evaluate change
- Variable commitment to long-term change
 - Election cycles
 - Shifting political agendas
- Organizational and fiscal cultures that are not flexible to change as needed

Closing thoughts



Best of Luck!



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