

# A Roadmap to Service and Resource Sharing in Public Health

## Introduction to the Roadmap

An increasing number of state and local public health agencies are turning to service and resource sharing (SRS) arrangements to provide the Foundational Public Health Services (FPHS), achieve Public Health Accreditation Board (PHAB) standards, or otherwise protect and promote the health of their communities and advance health equity in an efficient and effective manner. This Roadmap is designed to help guide the development and implementation of SRS arrangements.

Sharing services and resources allows communities to solve problems that cannot be solved – or easily solved – by a single organization. When public health departments and their partners share staff, expertise, funds, and programs across their respective boundaries (e.g. population served, service area, district, or governmental jurisdictions), they can accomplish more together than they could do alone. This practice can increase effectiveness by enhancing the quality of existing services or increasing capacity, and efficiency by maximizing the value of each dollar invested in delivering public health services. It can generate economies of scale and enable health departments and their partners to strengthen foundational activities and/or offer programs that otherwise would not be feasible. It can also be a powerful tool to advance health equity and improve the access to and delivery of public health services in the community.

Health department efforts to advance health equity vary widely in terms of their breadth and depth. Examples include: addressing upstream determinants of health, ensuring equitable access to existing services and resources, adopting culturally competent practices, and ensuring recruitment and retention of diverse staff.

A new or updated service and resource sharing arrangement can present an opportunity to introduce or expand efforts to advance health equity, and the Roadmap includes related guidance to facilitate such efforts.

While it is likely that many concepts this document are applicable to multiple types of collaborations, the document describes an approach to sharing arrangements that include at least one government health department working with other government or non-government organizations involved in protecting and promoting the public's health.

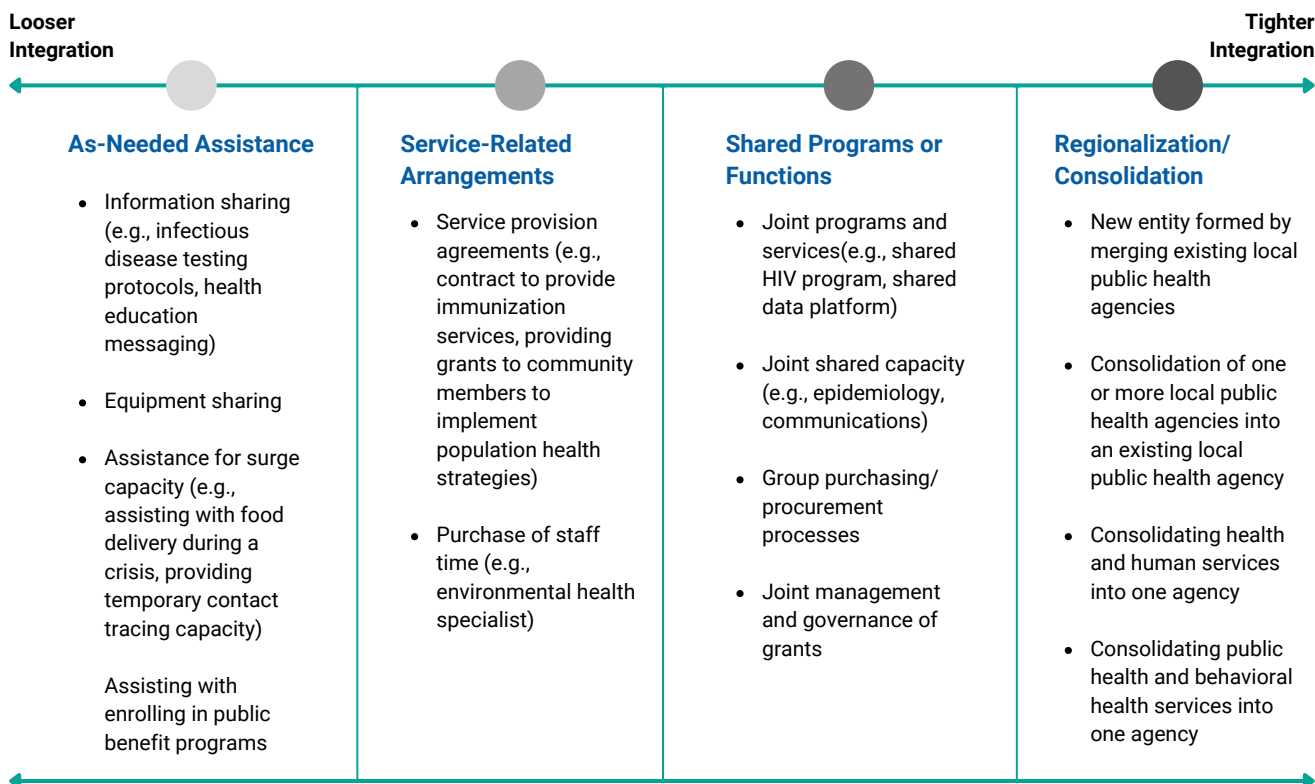
The Roadmap is a living document and will be refined and modified as new learnings emerge. For the latest information or if you have questions, please visit our website at [Service and Resource Sharing](#) or email us at [info@phaboard.org](mailto:info@phaboard.org).

## Types of Sharing Arrangements

A Spectrum of Sharing Arrangements (Spectrum) identifies four main types of arrangements (Figure 1). Generally, moving from left to right along the Spectrum, the level of service integration increases and the level of autonomy for the sharing partners decreases. The “best” arrangement is dependent on the specific needs, characteristics, and drivers of the services and resources to be shared. It's important for partners to understand that “form follows function,” and the most appropriate sharing model will emerge through careful exploration and planning. The Spectrum can serve to dispel preconceived notions about what service and resource sharing will automatically entail, and it can also help partners envision potential structures for sharing

## How does the Roadmap Work?

For those just beginning to pursue a sharing arrangement, the Roadmap provides an overview of how to develop the initiative and can help ensure that key questions and issues are addressed. For those experiencing barriers in their sharing work at any point, the Roadmap may help identify issues and questions that need to be examined or re-examined before moving forward. And for those well underway with a sharing effort, the Roadmap can serve as a checkpoint as the work continues to progress.



The Roadmap is intended to be a guide for those working on or considering sharing arrangements for their public health services. In the context of PHAB, public health services include those described in [the FPHS](#).

The Roadmap consists of three distinct phases that should be considered chronologically:

1. **Explore** the feasibility of an arrangement,
2. **Prepare and plan** for implementation of a specific arrangement, and
3. **Implement, monitor, and improve** the arrangement.

The Roadmap is organized into a series of tables under each phase that cover a broad range of topics, beginning on page 4 of this document. A list of questions to discuss is provided on the left side of the table, examples of possible actions to take are on the right, and links to selected tools and resources are provided at the end.

Please note that the action items in the right column do not align one-to-one with individual questions in the left column.

While you should go through the three phases chronologically, you need not address the topics within each phase in the order they are listed. It is possible that some topics or specific questions are not applicable to your situation, in which case you can skip them and move to the next. We do, however, encourage you to carefully consider the questions related to health equity in the event that the sharing agreement provides an opportunity to make strides in that area.

An important companion piece to the Roadmap is a list of [Success Factors](#) that increase the likelihood that a sharing arrangement will succeed. It is a good idea to refer to the Success Factors to make sure you are addressing all the necessary elements during the development and implementation of a sharing agreement.





## Phase One: EXPLORE

“Phase One: Explore” is focused on why you would consider a resource sharing arrangement and what type of arrangement to pursue. You can think of Phase One as exploring “conceptual feasibility.” An important part of this phase is to make sure those most accountable and responsible at your department, agency, or site are fully on board before moving forward. Successful sharing initiatives requires the support of both governing bodies (such as boards of directors or policymakers who have the authority to enter the shared arrangement) and executive staff (such as program directors or health officials who are responsible for carrying it out).

Actively engaging these key parties in the exploratory phase helps secure their commitment, dedication, and authentic support for the initiative. It’s not sufficient to assume their willingness; rather, confirm their support before moving on to preparation and planning.

### During Phase One, you’ll identify:

- The respective and collective reasons or drivers for a sharing arrangement.
- The history, culture and shared working experiences and perspectives of the participating partners.
- What is “on or off the table” when it comes to sharing arrangements.
- What services or functions would be considered for sharing; and
- What is needed to develop and sustain the relationship among the partners.

It’s extremely important to complete the exploratory activities in Phase One before moving on to Phase Two, rather than completing the two phases concurrently. This approach reflects the complexity of this work and is a necessary step to build trust and a strong foundation for a successful collaboration. Neglecting to address the questions in Phase One might slow down or even halt progress in Phase Two and Phase Three. The prerequisites in the Success Factors document (clarify your objectives, balanced approach and build trust) are particularly relevant during the exploration phase. See [Success Factors](#) for details.



## Phase Two: PREPARE AND PLAN

During the “Prepare and Plan” phase, you’ll examine whether and how the issues addressed and agreed to in Phase One can be implemented, resulting in an implementation plan that will meet your identified goals. You can think of Phase Two as “operational feasibility” planning. The activities in Phase Two must be based on the results of the exploration in Phase One – these two phases should not be done concurrently. You’ll address the logistical and operational aspects of implementing the intended sharing arrangement, including communications, ongoing change management (i.e., supporting all those affected by the changes created by the sharing arrangement), financing, legal issues, staffing, labor relations, facilities, timeline, and other aspects appropriate to the specific arrangement. In the process you may find it helpful to review the project characteristics listed in the SuccessFactors (senior-level support, strong project management skills, strong change management plans and effective communication). See [Success Factors](#) for more details.



## Phase Three: IMPLEMENT, MONITOR, AND IMPROVE

During the “Implement, Monitor and Improve” phase, you’ll focus on ensuring the arrangement meets the agreed-upon goals and the needs of each participating organization. In this phase, progress is monitored and reported to partners and stakeholders, and the results of the sharing arrangement relative to the desired outcomes of all partners is assessed, so that the needed improvements are identified and addressed. Attention needs to be also devoted to the effectiveness of ongoing communication and change management activities. And finally, be sure to evaluate the results of the sharing arrangement relative to the desired outcomes of all partners. It also is important to document your results and discuss them with policymakers, public health officials and top executives of all the organizations involved in the sharing arrangement, so that all can learn from your experience.



## Phase One: EXPLORE

### Conceptual Feasibility

#### Goals and Expectations:

Why would you consider a sharing arrangement?

Phase One: Explore

Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• What issue or problem needs to be addressed?</li> <li>• Can the solutions to the issue be found through internal management activities, reallocation of existing resources or other mechanisms?</li> <li>• Is resource sharing likely to help solve the issue being addressed? Why or why not?</li> <li>• What are the goals of the initiative being considered?</li> </ul>	<ul style="list-style-type: none"> <li>• Clearly define the problem to be addressed.</li> <li>• Determine the goals of the initiative.</li> <li>• List the mechanisms through which resource sharing can effectively address the problem.</li> <li>• Describe how efficiency and effectiveness could be improved through the sharing arrangement.</li> <li>• Describe how health equity could be improved through the sharing arrangement.</li> <li>• Examine alternative strategies to achieve the defined goals, including different forms of arrangements with partners.</li> </ul>

For more information: [Guidelines for Achieving Health Equity in Public Health Practice](#)

#### Scope of the Arrangement

What services and resources would be shared?

Phase One: Explore

Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• What public health services currently are offered by each partner?</li> <li>• What efforts are currently underway by each partner to advance health equity?</li> <li>• What resource sharing arrangements currently are in place? What can we learn from them?</li> <li>• What are the service gaps to fill, including strategies needed to address factors that contribute to specific populations' higher health risks and poorer health outcomes?</li> <li>• What could be considered for sharing (e.g., functions, programs, capacity)?</li> <li>• What specific services or functions would be included in this sharing initiative?</li> <li>• What services or functions are explicitly not considered for sharing?</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct a review to assess what capacities and gaps may exist (both at the organizational and at the community level).</li> <li>• Conduct an environmental scan to review existing activities relevant to the proposed initiative.</li> <li>• Determine the scope of the arrangement and the criteria to be balanced (e.g., capability, performance, cost, health equity).</li> <li>• Identify whether the sharing arrangement addresses and is likely to impact the problem identified.</li> <li>• Consider developing a logic model for the sharing arrangement under discussion.</li> </ul>

Resources: [Assessment and other Tools](#) | Developing a Logic Model for a Cross-Jurisdictional Sharing Initiative



## Phase One: **EXPLORE** Conceptual Feasibility

### Partners and Stakeholders

Who are the partners that should be involved?

Phase One: Explore

#### Questions to Consider

- Are there individuals or stakeholders who should be engaged in the exploration, e.g., because they will be affected by the arrangement, their buy-in is critical to the success of the shared arrangement, etc.?
- What are the motivations of each key partner?
- What are the guiding principles that the sharing effort would have? Do all the partners share these principles?

#### Possible Actions

- Brainstorm and prioritize potential partners for the initiative.
- Discuss potential partner context and history (including trust) as well as strengths and weaknesses relevant to partnering and identify top organizations.
- Communicate with stakeholder organizations about the potential benefits of the sharing initiative.
- Engage community members who will be impacted by the sharing arrangement in the exploration and planning process to avoid any unintended consequences and to maximize the effectiveness of new sharing arrangements.

Resource: [Collaborative Trust Scale](#)

### Context and History

Phase One: Explore

#### Questions to Consider

- What can be learned from past sharing initiatives, including those that do not involve public health services?
- Are there examples of how others have shared this service? If so, what can be learned from that?
- What is the history of relationships among the partners involved in or affected by this effort?
- Have any partners historically been excluded that should be involved?
- Are there other historical events, concerns, or perceptions that could impact an agreement?
- What are possible strengths-weaknesses-opportunities-threats (SWOT) to consider in the development of the action plan for the new initiative?

#### Possible Actions

- Conduct a SWOT analysis.
- Develop an inventory of existing or recent arrangements between the partners and assess their success and challenges.
- Use examples from other places or from the past to market the potential benefits of the sharing arrangement you are considering.

Resource: [Context and History](#) | Planning Checklist: Prepare and Plan



## Phase Two: **PREPARE AND PLAN** Logistical and Operational Feasibility

Governance	
Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• What are the governance options being considered for the new sharing arrangement?</li> <li>• How will the arrangement be managed, and oversight be assured?</li> <li>• How will the governance structure reflect the diverse interests and populations served by the sharing arrangement?</li> </ul>	<ul style="list-style-type: none"> <li>• Identify legal constraints or requirements that may affect governance decisions.</li> <li>• Review the governance structures of any sharing arrangements involving these or similar partners.</li> <li>• Articulate any specific oversight or management requirements expressed by the governing bodies or executives of the partnering organizations.</li> <li>• Establish a governance structure and procedures that incorporate the voice of specific interests or populations.</li> </ul>
<p><b>Resources:</b> <a href="#">Guide for Developing Legal Documents</a>   <a href="#">Approaches to Service and Resource Sharing</a>   <a href="#">COMPASS Phase 2: Governance Section</a></p>	

Phase Two: Prepare and Plan

Fiscal	
Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• Do the partners know the current and prospective costs of the resources to be shared?</li> <li>• If applicable, how will costs be allocated?</li> <li>• What are existing and potential funding streams that can assure adequate and sustainable operational funding?</li> <li>• Are there any local tax issues that need to be addressed?</li> <li>• Is there a significant difference between partner counties' average income that should be considered when determining cost allocations?</li> </ul>	<ul style="list-style-type: none"> <li>• Calculate current and/or projected service costs using a methodology commonly shared or understood by the partners.</li> <li>• Clearly communicate real and potential concerns about cost sharing (e.g., no tax money from one county will be spent on another county).</li> <li>• Identify any revenue source(s) supporting the shared service or capacity (e.g., third party contracts, grants, fees, etc.). Identify preferred option for sharing costs among partners (taking into account any restrictions on the funding sources).</li> <li>• Consider how revenue sources could be used to help ease the financial burden for lesser-resourced partners (e.g., allocate grant funds to help cover costs for specific areas or populations or use sliding fee scales.).</li> </ul>
<p><b>Resources:</b> <a href="#">Determining and Distributing Costs of Shared Public Health Services</a></p>	

Phase Two: Prepare and Plan



## Phase Two: PREPARE AND PLAN

### Logistical and Operational Feasibility

#### Service Implications

Phase Two: Prepare and Plan

##### Questions to Consider

- Are the potential benefits and costs acceptable to all partners?
- Will the plan maximize the potential of available resources (i.e., enhance efficiency)?
- Will the sharing arrangement affect the levels of performance of any current services or functions, or cause changes in capacity (i.e., will there be changes in effectiveness), and if so, how?
- Are there any policies and procedures that need to be revised to ensure that services are equally available to all who are served and otherwise make the sharing agreement successful? What are the reporting requirements (for example to funders, government agencies, boards) for the services that will be shared?

##### Possible Actions

- Describe the value of the sharing arrangement for each partner (e.g., increased cost-benefit, improved quality, wider service availability, improved equity, etc.).
- Analyze data related to health equity and special populations (e.g., subcounty health data, data on social determinants of health, etc.) that might have service implications and modify plans as needed to address them. Develop a flow chart or otherwise precisely define how services will be provided and identify how the proposed model impacts current policies and procedures and reporting requirements of each partner organization.

**Resources:** [A Practitioner's Guide for Advancing Health Equity](#) | [COMPASS Phase 2: Service Implications](#)

#### Communications

Phase Two: Prepare and Plan

##### Questions to Consider

- How will the partners communicate with each other?
- Are there external audiences with whom the partners should communicate?
- Are resources available to ensure that communications with the public are developed and disseminated in ways that are accessible to all served?

##### Possible Actions

- Develop a communications plan to engage the participating partners in the development and implementation of the sharing arrangement.
- Develop a communications plan to inform the stakeholders and relevant parties regarding the sharing arrangement.
- Secure resources as needed to ensure messages are appropriately developed for and shared with different populations.
- Develop a plan to orient new leadership about the current sharing initiatives and their value.

**Resource:** [Elements of a Strategic Communications Plan](#)





## Phase Two: **PREPARE AND PLAN** Logistical and Operational Feasibility

### Workforce Issues

Phase Two: Prepare and Plan

#### Questions to Consider

- Do any human resources policies need to be developed, harmonized or revised as a result of the sharing arrangement?
- Are principles of diversity, inclusion, and belonging reflected in every partner's human resources policies?
- How will partners ensure that shared staff reflect the populations served?
- How will partners ensure that shared staff feel a sense of inclusion and belonging?
- How will partners ensure that staff perform job responsibilities in a culturally competent manner?
- How will workforce-related issues and concerns unique to the sharing arrangement be handled? For example, performance evaluation, disciplinary issues, conflict resolution, workforce development, paid time off, workers' compensation, etc.

#### Possible Actions

- Review, harmonize and revise human resource policies as needed to address workforce issues related to the sharing arrangement and to guide partners' efforts to embody principles of diversity, inclusion, and belonging (e.g., listing pronouns in email signatures, requiring unconscious bias training for all staff, acknowledging holidays of all cultures).
- Provide relevant cultural competency training.
- Develop protocols for communicating about issues and concerns regarding employee performance, supervision, service provision, etc.
- Develop and hold orientation sessions for all employees directly affected by the sharing arrangement.
- Assure that a change management process (see below ) is used proactively to address concerns from all employees affected during the implementation of the sharing arrangement.

**Resources:** [State of Colorado: Creating a Culture of Belonging](#) | [Staff Sharing in Pubic Health Checklist](#)

### Timeline

Phase Two: Prepare and Plan

#### Questions to Consider

- Are there any externally imposed deadlines to accommodate?
- Are relevant staff included in developing the timeline?
- Are there any specific steps needed to ensure a sense of belonging and inclusion for staff or otherwise ensure the success of the sharing arrangement?

#### Possible Actions

- Determine desired start date of the sharing arrangement.
- Develop a workplan describing detailed steps and their timeline.
- If needed, extend the timeline to complete all activities critical to the success of the sharing arrangement and share the revised timeline with decisionmakers.

**Resource:** [Action Plan Template](#)





## Phase Two: **PREPARE AND PLAN** Logistical and Operational Feasibility

### Legal Sharing Arrangements

Phase Two: Prepare and Plan

#### Questions to Consider

- What kind of agreement (e.g., MOU, contract, government interlocal agreement, etc.) will be used to establish and govern the sharing initiative?
- Is the decision-making process (including conflict resolution) clearly identified and does it ensure a balance of power among the partners? Is the cost-sharing mechanism clearly defined?
- Who will have the authority to allocate resources?
- Is the duration of the agreement clearly identified?

#### Possible Actions

- Confer with counsel to understand legal concerns and available options.
- Identify similar sharing agreements in other sectors or organizations.
- Document any specifications required by governing bodies and executives for inclusion in the agreement.
- Draft a legal agreement for review by partners and their counsel.

**Resources:** [Guide for Developing Legal Documents Governing CJS Arrangements](#)

### Other Legal Issues

Phase Two: Prepare and Plan

#### Questions to Consider

- Are there issues related to personnel and vendor contracts (e.g., benefits, collective bargaining agreements, procurement processes, etc.)?
- Are partners amenable to giving contract preferences to minority, veteran, and/or woman owned businesses and if so, does a partner have policy to this end?
- Are there any liability and insurance issues to be addressed?
- Are there issues about HIPAA compliance or other data sharing processes? (See related data sharing issues on page 10.)

#### Possible Actions

- Inventory all legal agreements affected by the sharing arrangement (e.g., service contracts, equipment rentals, etc.) and identify any needed revisions.
- Conduct risk management assessments relative to the sharing agreement and determine any adjustments that may need to be made.
- Develop agreements regarding the selection of new contractors.

**Resource:** [Legal Sharing Arrangements and Legal Issues](#)



## Phase Two: **PREPARE AND PLAN** Logistical and Operational Feasibility

### Logistical Issues

Phase Two: Prepare and Plan

#### Questions to Consider

- Are there implications of the new sharing arrangement for buildings, office space, equipment, transportation, other properties, etc.?
- Are there adequate facilities to house all personnel, equipment, and programs within reasonable geographical proximity as relevant to the sharing arrangement?
- Are there any interoperability issues (e.g., phone, information technology, etc.) that need to be addressed? (See related data sharing issues on page 10.)
- Are there any logistical considerations to ensure that staff have a sense of belonging and that staff and clients with disabilities are accommodated?

#### Possible Actions

- Assess facility and equipment needs to support the sharing arrangement and ensure that any identified gaps and newly identified needs are addressed (including communication devices such as TTY or TDD technology, translation, or interpretation services, etc.).
- Test interoperability of phone system, information technology, etc., needed to support the sharing arrangement.

Resource: [ADA Checklists for Existing Facilities](#) | [Staff Sharing in Pubic Health Checklist](#)

### Change Management

Phase Two: Prepare and Plan

#### Questions to Consider

- What changes will occur as a result of the sharing arrangement?
- Who will be affected and how?
- What opportunities will staff have to influence what is being changed?
- How will changes be communicated internally as well as externally?
- How will leadership in the partners' organizations facilitate the change process?

#### Possible Actions

- Identify and implement a change management strategy to engage staff in the development and the execution of the sharing arrangement.
- Identify external partners and others potentially affected by the sharing arrangement and identify strategies to solicit feedback and keep them informed of changes as appropriate.
- Informing audiences that "nothing is new" can be an important message, as opposed to not communicating at all for long periods of time



## Phase Two: **PREPARE AND PLAN** Logistical and Operational Feasibility

### Performance Management

Phase Two: Prepare and Plan

#### Questions to Consider

- How will the partners, key stakeholders, clients, and staff define success?
- How will the partners measure success?
- Would it be helpful to establish any baseline measurements before the sharing agreement is implemented?
- What mechanisms will ensure that power differentials do not interfere with eliciting candid feedback, e.g., feedback from staff and clients.

#### Possible Actions

- Identify any external reporting requirements.
- Review relevant, currently available data across the participating organizations.
- Develop a plan to measure and report on the performance of the sharing arrangement, including the establishment of baseline measures as feasible and appropriate.
- Include performance measures that reflect principles of inclusivity, diversity, and equity (e.g., do staff working across departments feel a sense of belonging in all workspaces? Are populations in all jurisdictions being served in a culturally competent manner? Are shared staff adapting to different organizational cultures?)
- Establish processes to collect anonymous feedback from staff and clients.
- Establish processes to review and revise the agreement on a routine basis.

**Resource:** [Measuring DEI](#) | [Measuring the Impact of Cross Jurisdictional Sharing in Public Health](#)





## Phase Two: **PREPARE AND PLAN** Logistical and Operational Feasibility

### Data Sharing

Phase Two: Prepare and Plan

#### Questions to Consider

- What data will be needed to conduct the activities and monitor the performance and results of the sharing arrangement?
- Which information systems house, or will house, the needed data? Who will hold data ownership rights to data and other information collected and maintained through the sharing arrangement?
- How might applicable federal, state, or local laws and other policies impact the data sharing agreement? (See related legal issues, above.)
- Does the sharing arrangement provide an opportunity to improve data collection, e.g., at a more granular level, in a timelier manner, etc.?
- Are there IRB considerations that need to be addressed?
- Are trained, skilled staff available to collect qualitative data needed, particularly from communities with specific public health needs?
- Have communities been sufficiently engaged in developing data collection plans?
- How will data be shared with the community (e.g., distribution plans, language accessibility)?

#### Possible Actions

- Identify needed additions or changes to the information systems.
- Develop a data management plan that includes key elements such as a description of the data to be collected and maintained, security measures, responsible parties, access levels, retention procedures, ethics, privacy, informed consent, and the rest of the issues raised in the “Questions” section to the left.
- Develop and execute a formal data sharing agreement that covers all elements and issues identified in your data management plan.

**Resources:** [Connecting the Dots: A Data Sharing Framework for the local Public Health System](#) | [Charting the Course for an Equity-Centered Data System](#)





## Phase Three: IMPLEMENT, MONITOR AND IMPROVE

Put the plan in action, track the results, and revise as needed.

### Implementation and Management

Phase Three: Implement, Monitor and Improve

Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• Are the activities being implemented as planned?</li> <li>• Is there a strong management team in place?</li> <li>• Is senior-level support still assured?</li> <li>• Have any new issues or barriers emerged that have affected the sharing arrangement, including those that relate to health equity or IDEA principles?</li> </ul>	<ul style="list-style-type: none"> <li>• Review the program logic model, if one exists.</li> <li>• Review the workplan and check against activities actually implemented.</li> <li>• Review documents such as meeting agendas and minutes that can be helpful in identifying what is/is not working well.</li> <li>• Review agreements as planned and amend as needed.</li> <li>• Engage partners and senior management in conversations about their level of satisfaction and commitment to the sharing activities.</li> <li>• Review and revise program plans and budgets as needed to ensure the ongoing success of the agreement.</li> </ul>

**Resource:** [Developing a Logic Model for a Cross-Jurisdictional Sharing Initiative](#)

### Communications and Change Management

Phase Three: Implement, Monitor and Improve

Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• Are the change management and the communications plans being implemented?</li> <li>• Is communication among all parties flowing well?</li> <li>• Are new concerns or communications needs emerging from those affected by the new initiative (i.e., internal staff and leadership, clients, other key stakeholders)?</li> <li>• Are new leaders and partners – both internal and external – being oriented appropriately to ensure they are supportive, highly engaged and committed to successful collaboration?</li> <li>• Have any issues emerged that need to be factored into the communications plan or change management plan?</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a mechanism to ensure consistent input from affected organizations and individuals.</li> <li>• Track, review and evaluate strategies established in change management and communications plans developed in Phase Two.</li> <li>• Periodically review and revise the change management and communications plans as needed.</li> <li>• Orient new leadership about the current sharing initiatives and their value.</li> </ul>

**Resources:** [Strategic Communications Plan](#) | [Discussing Change Management in Public Health](#) | [Change Management: Its the Cheese on the Casserole](#)



## Phase Three: IMPLEMENT, MONITOR AND IMPROVE

Put the plan in action, track the results, and revise as needed.

### Monitoring and Improving

Phase Three: Implement, Monitor and Improve

Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• Is a performance management system fully operational to assess the effectiveness of the sharing arrangement (based on the definition of success developed in Phase Two)?</li> <li>• Are partners, clients and others affected by the initiative satisfied with the results?</li> <li>• Are processes being utilized to periodically review the arrangement’s scope, goals and cost-sharing strategies, and to consider its continuation, modification or termination?</li> <li>• Based on the results observed, is there a need to revisit some of the steps in Phase One or Phase Two?</li> <li>• Based on the challenges encountered, is there a need to engage in a quality improvement process or otherwise make improvements to how resources are being shared?</li> <li>• Have unanticipated events occurred or have issues emerged that should be reflected in the performance management plan?</li> </ul>	<ul style="list-style-type: none"> <li>• Solicit and analyze feedback from all who are affected by the initiative (e.g., through feedback and satisfaction surveys).</li> <li>• Conduct a process evaluation and other relevant evaluations and analyses (e.g., cost-benefit, return on investment, return on objectives, changes in program effectiveness or efficiency) and share results with stakeholders.</li> <li>• Based on the results of the evaluation, conduct a quality improvement process.</li> <li>• Update/revise performance measures as needed</li> </ul>

**Resource:** [Measuring the Impact of Cross-Jurisdictional Sharing in Public Health](#)

### Future Opportunities

Phase Three: Implement, Monitor and Improve

Questions to Consider	Possible Actions
<ul style="list-style-type: none"> <li>• What have you learned that could be helpful with future opportunities?</li> <li>• Are the experiences and lessons learned from the sharing arrangement being shared widely (e.g., with policymakers and partners’ governance bodies and leadership) so that all can learn from your experience?</li> </ul>	<ul style="list-style-type: none"> <li>• Revisit steps in Phase One and Phase Two to make all needed revisions for new or expanded agreements.</li> <li>• Engage stakeholders and members of the public in the pursuit of new sharing arrangements.</li> </ul>

**Resources:** [Tips for Public Health Engagement on Shared Services](#) | [Questions for Gap Analysis Discussions](#)