

Collaborative Strategy Development in a Regional Context

- VAFCC members are faced with the challenge of developing organizational strategy in an uncertain and dynamic environment of health care reform.
- Strategy development is especially challenging when the organization's future is intertwined with that of other service providers and funders in the local region.
- In this session we will introduce a framework for collaborative strategy development in a regional context.
- Various support tools for executing this framework are provided under 'Strategy Development' in the *Knowledge and Tools* space at <http://vafc.communifire.com>.

What Is Collaborative Strategy Development?

- In collaborative strategy development, two or more organizations develop their own strategies while exploring opportunities to collaborate for the mutual benefit of the organizations and the populations they serve.
- VAFCC members may engage in collaborative strategy development with other free clinics, federally qualified health centers, community services boards, local health departments, hospitals, health systems, physician practices, pharmacy providers, equipment suppliers, local government, funders, local business, faith communities, and other organizations.
- Collaborative strategy development could lead to a wide range of collaborative activities such as information exchange, sharing of space or administrative services, collaborative service delivery, collaborative policy advocacy, collaborative grant writing, collaborative evaluation, and even creation of new entities or mergers.
- There are no preconceptions in collaborative strategy development. The process begins with dialog and continues with systematic evaluation of collaboration ideas.

Preparing for Collaborative Strategy Development

- Much of the preparatory work for collaborative strategy development is based on the *Practical Strategy Development* model introduced in the fall 2012 strategy development workshops.
- Examine your own organization in terms of its mission, values, service region, service population, core competencies, key service partners, key

funders, and operating model (Steps 1 and 2 in *Practical Strategy Development*).

- Examine your operating environment in terms the key populations, service providers, and trends (Step 3 in *Practical Strategy Development*).
- Develop a vision of your organization for the near future (one to three years). The vision can be viewed as preliminary because we are working in a dynamic environment. (Steps 4, 5, and 6 in *Practical Strategy Development*)
- Learn about your potential collaborators in terms of their particular mission, vision, service region, service population, etc. You can do this via websites, annual reports, and conversations.

Getting Started with Collaborative Strategy Development

- Invite one or more potential collaborators to an informal meeting to get acquainted and exchange ideas about the future.
- If after this initial discussion you think there is potential for collaborative strategy development between the two organizations, ask about the possibility for one or more follow-up meetings with a more formal agenda. Then, over the next one to three meetings:
 - Exchange information about each organization's mission, values, service region, service population, scope of services, core competencies, and vision of the future.
 - Begin to identify ideas for collaboration. Stay conceptual. No commitments are being made at this point, so be creative.
 - Review your list of ideas for collaboration and ask: Which of these ideas could potentially add value to our service population and each of the organizations involved? Choose the ones that meet the criteria for further development.

Moving forward with Collaborative Strategy Development

- Each organization should convene a team to work on a collaboration action plan.
- The organizational leaders should provide strategic oversight to assure that the collaboration is designed to add value to the service population and each organization.
- No organization should sign onto the collaboration unless they believe the collaboration is designed to produce real value for the service population and every organization involved.

Ten Questions for a Startup Conversation about Collaborative Strategy Development

Use these ten questions as a guide for starting a conversation with a potential partner. You can ask these questions in the course of conversations in which you share your own answers to the same questions for your organization.

Question	Response
1. What is your organization's mission?	
2. What populations does your organization serve?	
3. What geographic area does your organization serve?	
4. What kinds of services does your organization provide?	
5. What are your areas of excellence, or core competencies?	
6. What are your measures of success?	
7. How are your plans and operations being affected by health care reform?	
8. What are your biggest question marks about the future?	
9. Do you see any areas where our organizations might collaborate?	
10. Would you be interested in talking more about the possibilities for collaboration?	

At Least a Dozen Services Your Organization Might Provide in the Future

The following matrix provides a list of services your organization might choose to provide for different populations in the future. You can use this tool as a framework for brainstorming ideas for collaborative strategy development. Neither the list of services nor the list of populations is exhaustive. The main purpose of this exercise is to stimulate your thinking about the scope of services your organization could provide, with or without full implementation of health care reform.

Service Type	Service Population						Other
	Uninsured to 200% Poverty	Uninsured to 250% Poverty	Uninsured to 250-400% Poverty	Medicaid Population	Low-Income Medicare Population	Low-Income Underinsured Population	
1. Primary Care (General)							
2. Primary Care (Chronic Care focus) ¹							
3. OB / GYN Care							
4. Medical Specialty Services							
5. Pharmacy Services							
6. Mental Health Services							
7. Dental Services							
8. Care Coordination Services ²							
9. Patient Self Management Supports ³							
10. Wellness / Health Promotion Services							
11. Interpretation / Translation Services							
12. Medicaid Education / Enrollment							
Other Services:							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							

¹ Some clinics may choose to specialize in providing primary care for patients with particular chronic conditions such as diabetes, hypertension, COPD, or other conditions.

² Care coordination is defined in different ways by different sources. The Improving Chronic Illness Care project defines care coordination as “the deliberate organization of patient care activities between two or more participants involved in a patient’s care to facilitate the appropriate delivery of health care services.” [1] In this definition, all providers working with a particular patient share important clinical information and have clear, shared expectations about their roles. Equally important, they work together to keep patients and their families informed and to ensure that effective referrals and transitions take place.

³ *Patient Self Management Supports* can include a variety of services aimed at helping patients take good care of themselves outside the clinical setting. Common services include education, reminders, and skill-building supports for medication adherence, diet, physical activity, and tobacco cessation.

VAFCC Strategy Development Survey

The purpose of this survey is to document where VAFCC member organizations stand in their strategy development process. The survey items are based on the steps in the *Practical Strategy Development* model introduced via the Strategy Development Workshops held in the fall of 2012. The results will be used to inform next steps and supports offered through the Road to Reform project. This survey is not a report card on your organization. Your individual survey results will only be shared with VAFCC and Community Health Solutions. **PLEASE SEND YOUR RESULTS TO COMMUNITY HEALTH SOLUTIONS IF YOU DID NOT COMPLETE THIS SURVEY AT THE ED CONFERENCE.**

Your name:					
Your organization:					
Step	Action	Completed	In Process	Not started	Could Use Assistance
1	We have convened a strategy development team.				
2a	We have conducted an operations review.				
2b.	We have conducted a strategy audit (reviewed our current strategy).				
3a	We have developed a regional service profile (who provides what services).				
3b	We have developed a regional influence profile (who and what may influence our future).				
4a	We have analyzed the possible status of our current patients under health care reform scenarios (e.g. how many might be eligible for Medicaid or the Exchange).				
4b	We have analyzed the possible status of our regional population under health care reform scenarios (e.g. how many might be eligible for Medicaid or the Exchange).				
4c	We have analyzed the level of primary care capacity that may be needed in our region under different health care reform scenarios.				
5	We have defined who we could serve and what scope of services we could provide under different health care reform scenarios.				
6	We have chosen our operating model for 2014 and beyond (e.g. free clinic, FQHC, Medicaid hybrid, rural health clinic, other).				
7	We have conduct a business plan analysis and identified risks that we need to address in order to achieve our future vision.				
8	We are systematically working on addressing our risks.				
9	We have produced a strategic plan for 2014.				
10	We have produced a business plan for 2014.				

Comments and suggestions:

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