Conference Report
Service Integration Seminar

Co-Sponsored by: Region 10, Administration for Children and Families, and Department of Social and Health Services, State of Washington
December 14 – 15, 2004, Seattle, WA

Purpose: The purpose of this seminar was to provide State representatives, from a variety of related programs, the opportunity to join with Federal partners in identifying and sharing specific lessons learned and emerging questions related to service integration efforts in Region 10. While several resource people were brought in from across the country to enrich the discussion, the focus was on peer-to-peer learning among the State participants.

Tuesday, December 14, 2004

The seminar opened with Steve Henigson, Regional Administrator for Region 10, Administration for Children and Families, welcoming representatives from Washington, Oregon, Alaska and Idaho. Programs represented included Child Support, Temporary Assistance for Needy Families (TANF), Headstart, Child Care, Workforce Investment Act (WIA) and Child Protective Services. Ed Hidano, Services Integration Manager for the Department of Social and Health Services, State of Washington, also welcomed participants and commented on how timely the subject is, given budget pressures and the need to think more creatively and strategically about how to best serve clients. Participants introduced themselves and talked about issues that were particularly important to them to be covered during the seminar.

Debbie Moller, facilitator, then asked Jack Tweedie, National Conference of State Legislatures; James Fong, Annie E. Casey Foundation; Tom Corbett, Institute for Research on Poverty; Susan Golonka, National Governor's Association, and Helen Thatcher, State of Utah, to participate in a fishbowl discussion regarding service integration efforts. The fishbowl participants commented that a number of forces seemed to be supporting service integration efforts, including a recognized need for behavioral changes, a focus on service delivery outcomes, an emphasis on devolution from Federal to State and local levels, and an often erroneous belief that significant cost savings can be gained through integration efforts. Tom Corbett reminded the group that service integration goes back to the 1880's, and the newest versions of an old idea is different because now the efforts include a focus on changing the behavior of clients, rather than simply providing cash support for the poor.

The fishbowl participants cited leadership, stewardship, and clear vision as being critical elements in the success of service integration efforts. They also agreed that persistence and patience are necessary, since integration of services is never a quick or simple process. However, if some changes aren't accomplished fairly quickly, it will be nearly

impossible to keep the momentum, and thus timelines must be ambitious and taken seriously. They agreed that integration takes at least 3-4 years and is never actually "done" – new opportunities and challenges will come with each new stage. Harvesting the "low hanging fruit" is important.

Some of the common challenges the participants had seen in programs across the country, include getting different organizational cultures to work effectively together; making sure that the benefits created by silos (specific services to target populations) are not lost in an integrated site, and measuring success across programs that may have different performance standards and expectations. In addition, it is important that leaders understand that the first rule of integration should be to do no harm, since some service integration efforts can actually create more problems than they solve. In addition, accountability and responsibility for service integration is often difficult to establish and maintain – no one is "on the line" for the success of the overall effort.

State participants broke into small groups to discuss the following questions:

(1) ***Barriers and Benefits from Interagency Cultural Differences/Strategies to Address*** – How do cultural differences in partner organizations create barriers and benefits in collaborative service delivery? How can we maximize the benefits and minimize the barriers? Facilitated by Helen Thatcher

Major themes for this session included that misunderstandings are common between organizations because they do not share a common language, organizational values and mission are different, and managers and staff often assume things will work a certain way because that is how it works in their organization. The importance of keeping the focus on the client and client success during these misunderstandings was stressed. It is harder to do this when budgets are decreasing. Participants reported that engaging staff in the changes can create a level of ownership that leads to amazing service levels for clients.

(2) ***Identifying Common Mission and Goals*** – How can we identify or create common mission and goals effectively? Facilitated by Jack Tweedie

Major themes included serving fewer people but providing more intensive services to meet more complicated needs. There are political and budgetary issues involved in serving such "high cost" clients. Mission and goals should be community, rather than government-driven; the public will should be expressed in the process of setting mission and goals. Building the strengths of the community is key. Federal outcome performance measures were seen as a good thing. There will always be tension between meeting outcome measures and balancing service integration.

(3) ***Leadership of Collaborative Programs*** – What is required for effectiveness? Facilitated by Debbie Moller

Major themes for this session included the need for leaders to have authority and clout to move integration efforts forward. Leaders must be able to keep pushing the agenda despite the discomfort of others at times. Because of the complexity of the programs involved, leaders must be suited to long-term, difficult policy work. They must be able to persist over the long run. The qualities that participants believed were most necessary for leaders in collaborative programs included courage, a strong personal belief in the value of customers, an ability to share and use power, and the ability to enable those involved to understand and act upon the leader's vision. All agreed that leaders in the programs being discussed have many things pulling at them and demanding their attention, and this can make it hard to devote the time and energy necessary to successful service integration.

(3) ***A Model of Elements for Successful Service Integration*** – Presentation of a model developed collaboratively through work of the Annie E. Casey Foundation, the National Governor's Association Policy Academy, and others. Facilitated by James Fong

James Fong presented the model and participants were able to discuss the applicability to their own programs, and hear how the model is being used in other areas of the country.

Following the sessions, a debrief was conducted for the whole group. Several participants suggested that the value of the conversations had been both in the information presented and the recognition that many of the challenges related to service integration efforts were being experienced by all the States, and there were no "silver bullet" answers.

Wednesday, December 15, 2004

The session opened with a presentation by Helen Thatcher, Administrator, Department of Workforce Security, State of Utah. Ms. Thatcher reviewed with the group how the State of Utah had combined 8 programs. She emphasized that it is important to first be clear about why integration is taking place and making sure it is of sufficient importance to undertake what will be a difficult journey. Ms. Thatcher outlined some key decisions that need to be made in service delivery under integrated systems, including how to staff cases, how to track and allocate funding, and how to best blend organizational cultures. Ms. Thatcher shared some of the elements that had been important to the success of Utah's efforts, as well as some of the lessons learned. She reminded the group that the complexity of the integrated model will create some real challenges for administration, and this must be managed very actively. Ms. Thatcher also provided some examples of partnering to meet a joint outcome.

State participants broke into small groups for the following sessions:

(1) ***National and Local Learning on Critical Elements to Successful Interagency Programs*** – What elements have seemed most critical to success? What does it take to create and sustain the key elements for success? Jack Tweedie, Facilitator

Major themes included the importance of focusing on how service integration benefits the client and maintaining awareness about legal use of funding across programs. Challenges included information sharing across programs, thinking through the specific advantages expected from service integration, understanding co-location doesn't mean service integration, and changing mental models to ensure that staff act from an integrated view of services.

(2) ***Assessing readiness for collaborative service delivery*** – How can we assess if we are ready to expand integration efforts? What must be in place in the beginning and what can we learn our way into? Helen Thatcher- Facilitator

Major themes included the importance of identifying program and values differences across departments or divisions that will be partnerin, and how it is necessary for there to be underlying political will to enable these changes; personality and skills are not enough. Also, participants agreed that there must be a sufficient level of dissatisfaction to support the challenges that will come with changing systems. Readiness is established by political/leadership, will, maturity and competence of all proposed partner programs, and shared vision/goals across proposed partnership.

(3) ***Technology and Other Supports*** – What technological interfaces or tools are necessary for successful collaboration? What other technical and policy supports have to be in place to be successful? Debbie Moller, Facilitator

Major themes included the difficulty in creating and using technological tools across programs when many of the programs in question operate with antiquated technology even within their own program. Participants noted that even though such technological gaps create difficulties, all were aware of program integration efforts that had achieved some success despite the technological challenges. There was also discussion about the level of technological interest/skill of current leaders, and how the more technologically skilled generation moving into leadership positions might significantly change how technology is used across programs.

(4) ***A Model of Elements for Successful Service Integration***. – Presentation of a model developed collaboratively through work of the Annie E. Casey Foundation, the National Governor's Association Policy Academy, and others. (Facilitated by James Fong) James Fong presented the model and participants were able to discuss the applicability to their own programs, and hear how the model is being used in other areas of the country.

The group debriefed the small group sessions with all the participants. Several participants noted that they would be using the model discussed by James Fong in their service integration efforts. The group and resource people discussed key issues that had come out of the small group sessions and resources available to the states to work through some of the challenges of integration.

The State and Federal teams met to create action plans related to the work of the seminar. Debbie Moller repeated her earlier expectation that the agenda for the seminar was designed to provide participants enough information to decide what they wanted to learn more about, and enough time with other state representatives to know who they would like to follow-up with after the seminar. Because the seminar was not designed to provide "the whole story", all teams were asked to meet to create an action plan for what they wanted to follow-up on after the seminar. Ms. Moller asked all the resource people to provide the state representatives parameters for what assistance they could provide.

Dennis Braddock, Secretary, Department of Social and Health Services, State of Washington, talked with the group about Washington's approach to service integration. Secretary Braddock reminded participants that social service clients don't think of themselves as clients, and don't want to be defined by their use of or need for social services. Because service integration can leverage a full range of services for clients, it can help them move away from that unwanted identify sooner. Braddock talked about the difficulty in exchanging data in collaborative efforts, and the long term nature of getting sites up and running. The secretary said that it is critical that communities take the lead and believe in the change in order for it to work. He sees the keys to success as training, technology, communication, leadership, having the right mix of partners and having the right resources. Secretary Braddock reminded the group that clients often site compassion and cultural respect as most important to them in dealing with social service agencies, rather than specific services or benefits.

State and Federal teams reported out the action plans they had developed for seminar follow-up activities.

Allan Eng, Food and Nutrition; Steve Henigson, Administration for Children and Families; Rosemary Cowan, Department of Labor Employment and Training Administration; and Kathy West Evans, Department of Education Vocational Rehabilitation served as a panel to represent the Federal perspective on challenges and opportunities involved in service integration. Themes included the ways in which statutes can prevent effective collaboration; how States are often far better positioned than Federal agency staff to leverage changes that support integration; that often a crises, such as in child welfare, becomes the motivator for increased service integration; and how important it is for State representatives to look in the regulations and identify the areas that they do have control over and flexibility within. The Federal panel gave examples of misinterpretations in which State representatives assumed a regulation was more stringent than it actually was.

Following the Federal panel, the group did a wrap-up and an evaluation of the session. Suggestions for improvement included giving more time to the breakouts, having States create poster board presentations about their projects, and having more in-depth information on some of the models. The State representatives said they appreciated having the resource people available at the seminar and that the pace was good. In addition, the pre-seminar preparation work paid off. Participants appreciated the resource materials, available on the resource Web site:
http://www.acf.hhs.gov/programs/region10/resources/region_10_service_int_conf. html

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