

CCA Shared Services Plan Frequently Asked Questions (FAQ's)

1. What is Shared Services?

A classic model of shared services is centralized management and delivery of a range of services to different units within the same organization whereby the units formerly did these services locally for themselves. Benchmarks are used to ensure excellence of service delivery. It is cost effective due to the elimination of redundancy of function and costs are shared based on level of need.

2. What is the Shared Services Plan for CCA?

The plan as envisaged for CCA is a modification of the original shared services concept. The service provider could be a sister in one community offering her expertise to perform the required service for other communities on behalf of the association, e.g., technology. It could also be an outsourced service provider, e.g., bookkeeping. The bookkeeping would still be done on site locally, but by the same outsourced provider that other communities in the association would use. The contract for such a service would then free up sisters doing that function currently within their community. The cost for providing this service would be less if contracted by CCA under a shared pricing model where leverage and scale (more than one community using the service) would result in cost savings over individually contracting for such services.

3. Why did CCA initiate the development of such a Plan?

Through the sisterly visits, and completion of a survey to identify needs of the CCA communities, it has become clear that in many communities sisters are overly burdened with functions that demand a great deal of their time, such as healthcare management, bookkeeping, food servicing, etc. that result in much stress and loss of quality in living the contemplative life. Also as time goes on, some of these functions require a level of expertise to perform them well that may be lacking in the community. In some cases local volunteers have been used, but over time this may not be a sustainable model. CCA then began to explore options. There are existing religious communities that have adopted a shared service model, e.g., the Wisconsin Religious Collaborative. These were looked at to learn from.

4. How is the planning process being paid for?

In order to embark on a planning process, CCA was introduced to the GHR Foundation who had assisted the Wisconsin Religious Collaborative with grant funding. Ultimately, CCA was invited to submit a proposal and was awarded a grant for \$80,000 by GHR Foundation in August 2019. This funding is paying for Kate's services as well as for advisory consultants.

5. What are the benefits of a CCA Shared Services Plan?

It is envisaged that the benefits will be: 1) provision of needed services with professional quality; 2) reduced cost by contracting at the CCA level benefiting from scale of more than one community using the services; 3) freeing up sisters within the communities from the burden of delivery of these services for themselves.

6. What are the costs of a CCA Shared Services Plan?

- a. When a service is contracted with a vendor, the cost to each participating community will be their share of the service contract. These contracts are still being negotiated and so costs at this point cannot as yet be determined. Contract prices will be negotiated based on how many communities adopt a particular service and what the service parameters are.
- b. An additional anticipated cost would be the cost of the services of a part-time Shared Services Administrator who will coordinate this program for our member Carmels.

c. Other consulting services including legal consulting services available to all.

7. How will our member communities participate in these benefits and costs?

It is envisaged that member communities will determine which services they will sign up for. CCA will contract for those services on behalf of the communities. Each community will pay CCA for their share of the service(s) cost(s) based on the contract parameters and levels of service which may vary by community.

8. What are some of the services currently being considered?

Based on the surveys and community assessments the following service categories are envisaged for some and/or many of the communities: Healthcare, Technology, Financial, Administration, Investment, Food, and Transition Management.

9. What if my community needs assistance in one of these proposed areas NOW?

The Project Manager has been referring communities in need now with some specific potential solutions. Additionally, while the plan is being finalized, it is anticipated that in some cases, actual service delivery may be implemented. An example of this is the engagement of a healthcare “Navigator” by CCA to consult with local communities and identify local healthcare coordinators and other resources to meet current medical needs.

10. When will the plan be completed?

It is currently anticipated that the plan will be completed by Oct. 31, 2020.

11. How can my community be more involved in the development of this plan?

A community can become more engaged by offering a member to serve on the CCA Shared Services Advisory Group to assist in finalizing the plan and bridging into its actual implementation. More about the formation of this group will be shared at the meeting. It is envisaged that the Advisory Group would have representatives from each of the communities inclusive of the LT.

12. How are service providers selected and engaged? How will they be accessed?

The Project Manager has been consulting with various organizations and individuals for recommendations including the CCA communities, NRRO, RCRI, etc. A preliminary view of anticipated providers and the basis for selection will be shared at the meeting. Selected providers will be invited to offer potential contracts once the scope of services for the communities is provided to them. CCA will engage legal services to assist in the contracting process, which will include service delivery parameters in terms of responsiveness and quality. Once contracts are in place, services will be accessed directly by the communities using those services.

13. After the plan is completed, what are the next steps?

To finalize an actionable plan, communities will sign up for the services needed, and provider pricing as well as scope/metrics for each service will be determined. Then contracts can be signed and service delivery will begin.

14. How will the Shared Services be administered and managed in its implementation phase?

It is anticipated that for the implementation phase that CCA will need to engage an administrator of the plan.

15. How obligated is my community as a CCA member to support the implementation of the plan if adopted by the CCA?

It is envisaged that there would be some kind of general fee imposed on each member community to

support the administrative costs of CCA to manage the Shared Services delivery (much like a membership fee.). Beyond this, the communities will determine which of the services they will use, and share in those costs.

16. Can others beside CCA benefit from these Shared Services and share some of the costs?

This is an area for potential exploration. The current plan was envisaged for the CCA communities, but it could be expanded to include other Carmelite associations or specific communities in the future, which would decrease the cost of services.

17. Does CCA anticipate receiving any additional funding to support the initial implementation phase of the plan?

There is a hopeful sign that the GHR Foundation will invite CCA to submit another proposal for seed funding for implementation. The CCA fundraising committee is continuing its work in seeking funding for CCA priorities.

18. How flexible will the Shared Services Plan be to changes in our Association and its members over time? What is envisaged as the length of an initial contract?

The current thinking is that service contracts and community commitments would be for three years. Recognizing that needs may change over time, flexibility will be a consideration as service contracts are put in place. It is possible that communities who do not opt for a service initially, may later determine that they need it. This will be part of what needs to be managed in the implementation phase.