

## **SECTION 7**

### **Organizational Linkages and Partnerships**

Drop-ins develop relationships with organizations based on shared communities – whether this is a **geographic community** (for example, neighbourhood businesses or a local police division) or a **community of interest** (for example, research institutions or other drop-ins and service providers across Toronto).

Relationships with businesses, organizations, and institutions in the local area may be informal – mutually supportive contributions based on friendships between individual staff members – or formal – official letters of agreements with specific negotiated terms. Informal relationships are discussed in more detail in Section 6: Community Relations.

This Section discusses formalized interactions based on shared populations and shared interests:

- **7A STUDENTS AND RESEARCHERS**
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## SUBSECTION 7A

### Students And Researchers

Drop-ins regularly find themselves being asked to participate in various research projects and fieldwork studies; many service providers lament that the population they work with is over-studied yet under-served.

**There are many compelling reasons to participate in the research process; for example:**

- Having the work of the drop-in validated by an objective third party;
- Forming bridges between social service agencies and academic institutions;
- Learning new research skills, enhancing the drop-in’s research capacity, and improving existing data collection and analysis efforts (e.g. participant surveys, focus groups, etc.);
- Stimulating dialogue and reflection among staff, Board members, volunteers and participants, and fostering a “culture of inquiry” within the wider drop-in network;
- Integrating evaluation into day-to-day practice and program development;
- Informing and strengthening strategic planning, fundraising activities and public relations; and
- Obtaining documentation of the impact of funder dollars to assist with future grant applications.

**However, each proposal should be considered very carefully before the drop-in grants permission to conduct research.**

#### *Criteria*

There are different types of research and each brings different considerations of their impact on the drop-in environment:

- **Students** (e.g. nurses, social workers, or, in faith-based drop-ins, seminarians) may apply to do a fieldwork placement at the drop-in; this integrates them into the staff of the drop-in.
- **Professional health workers or medical researchers** may want to conduct controlled trials, physical tests, surveys, and/or interviews with participants.
- **Anthropologists or social scientists** may request permission to spend time in the drop-in to work with participants on any number of social issues; they may have a course of study in mind or they may wish to develop one in collaboration with you and with participants.

**Student placements** are a fairly regulated type of academic involvement in the drop-in. The sponsoring school will often have forms and agreements to sign that specify the drop-in's responsibilities, the school's responsibilities, the student's responsibilities, and the mechanisms for monitoring these.

**Professional researchers** from the health or social sciences need to be assessed on a proposal-by-proposal basis. Your drop-in should have a basic set of criteria for handling these types of requests.

**The following are some questions that will help you assess professional research proposals:**

- 1. Institutionalized support.** Is this research project associated with a university or some other form of legitimate institution?
- 2. Ethics review.** Has the research proposal been evaluated by a Research Ethics Board (REB)? If so, how did the REB rank the project's "research risk"?<sup>1</sup>
- 3. Purpose and methods.** What do the researchers want? What types of information are they looking for? Will they be asking highly sensitive questions? If this is medical research, will the researchers be requesting blood, tissue, or other types of physical samples?
- 4. Informed consent.** What is the researchers' process for obtaining informed consent from participants? In other words, what is the researchers' strategy for asking individuals to participate in the study, and are they disclosing fully the purpose, methods, and future uses of the research?
- 5. Risks and benefits.** Will the participants be compensated for their time and work (e.g. through honoraria, TTC tokens, refreshments, etc.)? What are the risks involved? Will there be any immediate or future benefits to the drop-in and its delivery of service? How will the research project benefit the community it reports on?
- 6. Needs.** What resources and facilities do the researchers require from the drop-in? (For example – A private room to conduct interviews?)

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<sup>1</sup> "Research risk" is defined by the University of Toronto's Ethics Review Office as "the probability and magnitude of harms participants may experience as a result of the proposed methods to be used and types of data to be collected, e.g., relating to physiological or health issues such as clinical diagnoses or side effects, cognitive or emotional factors such as stress or anxiety during data collection, and socio-economic or legal ramifications such as stigma, loss of employment, deportation, or criminal investigation (e.g., in the event of duty to report intent to cause serious harm, subpoena, or breach of confidentiality)." See the Ethics Review Office website at: [www.research.utoronto.ca/ethics/eh\\_when.html#req](http://www.research.utoronto.ca/ethics/eh_when.html#req).

Temporary filing space? Drop-in staff facilitation and supervision? Use of the photocopier, telephones, and/or computer printer?)

7. **Outcomes.** What do the researchers plan to do with the information they have gathered? How do they plan to safely store sensitive information? How long will this information be kept? Where will the results be published? Will the researchers make copies of their work available to you?

### ***Community-Academic Partnerships***

In the case of research that is envisioned as an intensive, longer-term project, it may be worthwhile for your drop-in to build a community-academic partnership project with the researchers. This **collaborative approach** has the goal of combining knowledge with action and achieving social change. It involves:

- Determining a topic for study of mutual interest or benefit;
- Recognizing the strengths and areas of expertise of all collaborators (including researchers, drop-in staff, and participants);
- Understanding the needs and constraints of all collaborators; and
- Jointly developing operating procedures, leadership protocols, and communication mechanisms with the input and agreement of all partners.

In this model, all interested collaborators participate in authoring publications, presenting conference papers, and giving media briefings. Findings are disseminated in accessible ways to all those who participated in the study. Projects have an agreed upon method and timetable for: evaluating both the project activity and the collaboration itself, and revising partnership activities to incorporate these learnings.

## SUBSECTION 7B

### Police

The needs and interests of drop-ins and police divisions can sometimes clash. The primary objective of drop-ins is to create a safe space for socially marginalized folks to go and develop a community of trusting relationships with staff and other participants. The primary goal for police, on the other hand, is to stop people from engaging in illegal activities and to get criminals off the streets. Some drop-in users may be involved in illegal activities such as the drug trade and prostitution, and many participants have regular interactions with the police. There are times when police will want to come into the drop-in to see if someone they are pursuing is there; there are also times when staff need to call on the police to intervene in a crisis situation at the drop-in.

These conflicting mandates require some management. It is a good practice for drop-ins to develop guidelines for police activities within the drop-in (see **Appendix 7B.1** for a sample protocol). These guidelines may be most effective when developed collaboratively with police representatives. However, whether or not individual police officers have a hand in writing this document, all local police divisions need to be made aware of its existence and its requirements.

It is important to build relationships with local officers so that they understand what kind of work the drop-in does. There are various ways to do this; one of the best is simply to strike up conversations with local officers and develop a **friendly rapport**. Another way is to serve on a **police liaison committee**. Another way is to run a workshop or give a **presentation** to the local police division on what your drop-in does, its role in the social service sector, its philosophy in dealing with socially marginalized individuals, and what your staff expect in terms of police interactions with the drop-in. It is important to **set boundaries**: the idea, as one drop-in staff phrased it, is that “We will help each other to meet our separate goals, but we are not an extension or a part of your organization.”

#### ATTACHMENT:

- **Appendix 7B.1 – Sample Protocol for Police Activity within the Drop-In**

## **Appendix 7B.1 Sample Protocol for Police Activity within the Drop-In**

**Source:** Adapted from documents collected from TDIN drop-ins during the Good Practices Toolkit consultations, May-July 2006.

### **POLICY AND PROCEDURE FOR POLICE ACTIVITY WITHIN THE DROP-IN**

**Policy.** In order for a co-operative, positive, and mutually beneficial relationship to be built between the drop-in and the police force, several qualities must be present.

- 1. Respect.** One of the primary qualities essential to such a relationship is respect. Police and drop-in staff must treat each other, and community members, with the utmost respect, on the understanding that we are all trying to fulfill our respective responsibilities.
- 2. Trust.** While Police and drop-in staff may have different primary responsibilities, they are both working for the improvement of society by helping individuals arrive at a place where they can be contributing members of society. This can only happen if Police and staff learn to trust one another and work hard to gain the trust of community members. This will be achieved most easily if both groups continue to develop a relationship of honesty.
- 3. Cooperation.** In order to achieve the goal of having community members achieve healthy and full lives, it will be necessary for Police and staff to cooperate with one another. While there may sometimes be some tension between Police and staff because of their different approaches, they must agree to cooperate to the extent that they are able within the constraints of their particular positions.

**Procedures.** When members of the Police come to the door of the drop-in:

- Police will speak politely to staff, asking permission to enter, and announcing their reason for wishing to do so. They will offer their names and badge numbers, or at least ensure that their badge numbers are visible.
- Staff will greet officers politely and respectfully and invite officers to enter, once they have been informed of the reason for the visit.
- If officers come to the door with an arrest or a search warrant, they will inform staff at the door and staff will immediately assist the officers in whatever way they can.
- In situations when officers come to the drop-in with a warrant of apprehension for an individual, Police will take the person to a site nearby for conversation, rather than talking with them within the building, recognizing the unsettling impact that prolonged Police presence within the drop-in can have on community members.
- When Police are in “fresh” or “hot” pursuit of a suspect who enters the drop-in, officers will simply state that they are police in “fresh” or “hot” pursuit and they will be admitted promptly without challenge. Staff will be educated to respond without challenge to officers apparently in “fresh” or “hot” pursuit.
- In situations when staff call Police to intervene in an altercation, Police will respond promptly as requested. In these situations, it may be more expedient for officers to conduct their interviews on-site. In these situations, staff will assist officers in whatever way they can.

## SUBSECTION 7C

### Social Service Agencies

#### ***Outreach and “In-Reach”***

Relationships and interactions between the drop-in and other social service organizations can take many different forms. One important distinction may be made between agency outreach and agency “in-reach.” **Agency outreach** involves referrals and continuity of care as an individual travels to different agencies to access services. **Agency in-reach** refers to representatives from other agencies or professions who come into the drop-in to conduct workshops – for example, tenant rights activists – or provide services – for example, legal aid lawyers, nurse practitioners, or housing workers.

Both outreach and in-reach are important, and neither can be used to the exclusion of the other. However, in-reach has been recommended by a number of drop-ins as an extremely effective way to help participants overcome barriers to accessing services (such as bureaucratic red tape, individuals’ fear of authority and transportation to distant locations).

#### ***Types of Inter-Agency Interactions***

Organizational linkages can be either formal or informal, regularized or sporadic. Agencies may continue to run as separate entities, operating according to their own mandates, and interacting with other agencies only to make and accept referrals or to make and accept donations of goods, services, or space. At the other end of the scale, inter-agency partnerships are always formalized and involve joint decision-making and integration of visions. Partnerships are often entered into in order to harmonize services to a particular population, or to access a source of funding that will allow for the development of a new program.

#### **Types of inter-agency interactions include:**

- **Donations of goods** – As discussed above, you may develop an agreement with another organization (e.g. Second Harvest or Moores), where they make regular and dependable donations of food, clothing, or other useful goods;
- **Donations of services** – You may get legal clinic lawyers, student nurses, or counselors, to come in at regular times during the week (or the month) during drop-in hours to make themselves available for clients who need to access these services;
- **Referrals** – You have a strong working relationship with other agencies in your area and you can refer the client to the services and programs they offer as required. The strong working relationship between

organizations is necessary for the referral to be effective and for the client to not get lost in bureaucratic red tape or bounced from agency to agency;

- **Workshops** – You may organize workshops periodically where a speaker from another organization comes in to give a presentation (e.g. on tenants' rights);
- **External programs** – You may get an external organization to run a program at regularly scheduled hours each week at your drop-in;
- **Joint programs** – You may work with another organization to jointly develop and operate a program; or
- **Agency-mandated drop-ins** – Your drop-in operates as one part of a larger umbrella organization (e.g. Canadian Red Cross or Fontbonne Ministries). This agency provides all of your funding, or a significant portion of your funding, and your main policies are determined by the larger organization.

Some of these types of inter-agency interactions are discussed elsewhere; see Section 2 for a discussion of referrals and programming activities, and Section 8 for a discussion of financial and in-kind donations.

**The rest of this Section focuses on formalized working agreements or partnerships between agencies.**

### ***Programming Partnerships***

Developing inter-agency partnerships is a complex and challenging endeavour. It is important to start with an open, honest discussion about each organization's resources, capacity and mandate. Clearly define boundaries and roles, and don't avoid difficult questions. It is better to expose and manage potential disagreements from the start, rather than have these explode halfway through a project.

Be aware that potential tensions may arise over funding sources; for example, some drop-ins refuse to accept money from pharmaceutical companies or weapons manufacturers (see Subsection 8B for further discussion of the ethical considerations involved with funding). It is also a good practice to build in partnership evaluation mechanisms; for example, a review period every year that assesses program outcomes, communication and decision-making among partners, and any barriers to success of the program.

**Continuity.** For many drop-ins, partnerships or in-reach service provision relationships tend to be fairly informal and based on goodwill between individuals. The problem with this is that whenever there is a period of transition – for example, if an individual chiropract offering weekly services to drop-in participants leaves, that service is no

longer offered by the drop-in. Or, on the other side of the coin, if the individual staff member who was coordinating the service leaves, the drop-in's relationship with the service provider may break down.

**To ensure continuity of care and stability of the partnership, it is a good practice to sign a formal agreement with the partner agency (or agencies). This letter of agreement, or memorandum of agreement, should spell out:**

- Project objectives and core principles;
- Each agency's responsibilities and shared policies;
- Mechanisms for decision-making; program development, management, and evaluation; inter-agency communication; conflict resolution; staff hiring, supervision, and training; getting funding, setting budgets, and managing finances.<sup>2</sup>

A **service delivery** plan is also useful, and should involve a more detailed and practical description of the project, including timelines for each aspect of the service delivery, anticipated outcomes of the project, a detailed project budget, and so forth.<sup>3</sup> For more detailed discussion and a useful step-by-step guide to creating a memorandum of agreement and a service delivery plan, please see **Appendix 7C.1**.

**Strategies for smaller drop-ins.** Smaller agencies, some of which do not have staff exclusively dedicated to administrative duties, may not have the capacity to do a detailed letter of agreement or service delivery plan. These drop-ins should still work to formalize their partnerships with other agencies, through:

- **Regular communications** between different staff members (to ensure that strong working relationships are fostered between more than two individuals); and
- **Writing a less-detailed memorandum of agreement.** Even you lack the time and resources to think through this agreement in the detail discussed above and in **Appendix 7C.1**, it is still important to document the terms of the partnership. This documentation could take the form of minutes from the first meeting and a letter briefly outlining the main terms that confirms for both parties what was discussed. See **Appendix 7C.2** for a sample partnership agreement template.

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<sup>2</sup> Adapted from United Way of Greater Toronto, "Developing a Memorandum of Understanding," *Suburban Strategy Multi-Agency Partnership Project (MAPP) Partnership Workbook*, prepared by Community Consultant Rob Howarth, April 2002.

<sup>3</sup> *Ibid.*

### ***Tips for Working with Other Organizations***

The first step is to find and select a partner agency or partner agencies. Finding the right match of both people and programs involves a process of trial and error:

- **Know what programming resources you are looking for** and then seek out a partner (e.g. Community Health Centres are often a great resource for those wishing to provide basic health support);
- Think about your **approach and values** – what is needed at the drop-in versus what someone wants to offer; and
- Remember that finding good programming partners takes **work, time, and outreach**. For many drop-ins, outreach, community relations, and fostering strong inter-agency relationships are seen as a key role of the Executive Director.

**Once you have located a potential partner or potential partners, you may want to consider the following checklist of good practices for working with other organizations:<sup>4</sup>**

- Keep the arrangement **as simple as possible**: vast and detailed service level agreements may stimulate the conflict they are designed to avoid;
- There must be someone who can make **real time decisions** on the partnership's behalf (committees are, on the whole, not very good at this);
- **Progressive partnerships** where one partner takes the service user to a certain stage, and the other then takes over, seem to work better than horizontal partnerships, where both partners deliver the same services and simply pool resources (this is generally due to the fact that the former avoids “competition”);
- Recognize the **value of different agendas**, and identify “what’s in it for them?” for potential partners; and
- Ensure that both parties have a **similar level of interest** – if they don’t, then the partnership will tend to fall apart as the high interest group starts to dominate and the low interest group leaves.

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<sup>4</sup> Adapted from Homeless Link, “11: Working with other organisations,” *Day centres handbook: A good practice guide*, London (UK): Homeless Link, 2004, page 11.3.

Specific tools and mechanisms for successful partnerships include:<sup>5</sup>

- Agreed principles of joint working;
- Clearly defined roles and responsibilities of partner agencies;
- Joint training and visits between agencies;
- Organizational, not just individual, commitment to joint projects;
- Clear work plans specifying who will do what and giving a timeline;
- Explicit acknowledgement that agencies might sometimes be in competition for funds and agreeing how to deal with such occurrences; and
- An identified individual who will facilitate and drive the process of joint work.

### ***Communication and Confidentiality***

It is a good practice to keep the following checklist of effective communications in mind when working with other agencies:<sup>6</sup>

- The drop-in ensures that other agencies know who it is and what it does, and are kept informed of changes and developments in their service;
- The drop-in is aware of other agencies' responsibilities and constraints;
- The drop-in is actively engaged with relevant local forums (e.g. on homelessness, health, personal and community safety, etc.);
- The drop-in shares its expertise, and educates other organizations about homelessness (e.g. through training for statutory services, like police and health providers, or through open houses, or through public speaking engagements at local community groups, like churches and Rotary clubs);
- The drop-in is prepared to learn from others' expertise and knowledge, asking the other organizations how they do things;
- Joint working protocols are developed with services working regularly with drop-in centre service users, and these are periodically reviewed;
- The drop-in has a written policy and procedure on referring service users to other organizations or internal services, which has been discussed with other organizations and internally reviewed;
- Referrals and referral responses are tracked wherever possible;
- Staff have up-to-date information on the services offered by other agencies and their referral procedures;
- Complaints procedures are used when external organizations don't fulfill their obligations; and
- Information is transferred in compliance with confidentiality, risk management, and data protection policies.

Sharing sensitive information about clients is a necessary and important part of working with other organizations. However, **confidentiality is key**, and staff should be aware of each agency's protocols protecting personal information and any relevant legislation (see **Appendix 7C.3** for a list). For example: If you have clients who have spent time in

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<sup>5</sup> *Ibid.*, page 11.4.

<sup>6</sup> *Ibid.*, page 11.1.

mental health facilities, you may only view their records if the client signs a Consent to Disclosure, Transmittal or Examination of a Clinical Record form.<sup>7</sup>

**Some basic points to keep in mind when sharing information between agencies are:**

- Is the participant aware of how their information will be used and who will see it (i.e. other organizations)?
- Has the participant given informed consent for you to share their information with other agencies?
- Will the other organization share that information with third parties? How does the other organization plan to store the information you provide? (For example, will it be password-protected on the computer?)

For further discussion of privacy policies and confidentiality forms as they relate to drop-in staff, volunteers, and participants, please see Subsection 2O: Confidentiality. For further discussion of protecting the personal information of donors, see Subsection 8B: Ethical Considerations.

**ATTACHMENTS:**

- Appendix 7C.1 – Memorandum of Understanding and Service Delivery Plan Guidelines
- Appendix 7C.2 – Sample Partnership Agreement
- Appendix 7C.3 – List of Protection of Privacy Legislation

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<sup>7</sup> Form 14 is available for download from the Ontario Medical Association website at: [www.oma.org/Practice/Tools/forms/FORM%2014%20-%20Mental%20Health%20Act.pdf](http://www.oma.org/Practice/Tools/forms/FORM%2014%20-%20Mental%20Health%20Act.pdf).

## Appendix 7C.1 Memorandum of Understanding and Service Delivery Plan Guidelines

Source: Adapted from United Way of Greater Toronto, “Developing a Memorandum of Understanding,” *Suburban Strategy Multi-Agency Partnership Project (MAPP) Partnership Workbook*, prepared by Community Consultant Rob Howarth, April 2002.

### MEMORANDUM OF UNDERSTANDING AND SERVICE DELIVERY PLAN GUIDELINES

#### I. MEMORANDUM OF UNDERSTANDING

##### 1. Partnership Description

- A) Who are the Members of the Partnership and what are their key roles (e.g. service provider, project coordination, referral source)?
- B) What are the Core Values that partners agree are central to the partnership’s work?
- Values statements should be about project principles that are non-negotiable and therefore will not be compromised under any circumstances. These value statements may include:
    - ✓ Commitments to how the services will be carried out (statements about service conditions and principles, for example: providing a safe and accessible environment; involving program participants and community members in decision-making; and upholding principles of equity, access, anti-racism and inclusion).
    - ✓ Commitments to how the partnership organizations will work with each other (statements about transparency, trust, integrity, equity, respect, accountability, clear communication).
    - ✓ Statements about the importance of empowering and supporting the community or target group(s).
- C) What are the objectives and intended outcomes of the partnership?
- Briefly summarize the service-delivery goals of the partnership.
  - What are the intended impacts of the services on the lives of the program participants (and the broader community, if applicable)?
  - What are the objectives for the partnership itself (for example “building capacity of community organizations to work collaboratively on issues of shared concern”)?
- D) What neighbourhood will the partnership operate in?
- Identify the geographic neighbourhood and location(s) where the project will be delivered (including population and languages spoken).
- E) How was the need for services identified?
- Which population(s) do you expect to provide services to?
  - Briefly explain why you chose this population(s) and what their service needs are.

- How do you know that these are the needs of the target group(s)? Please reference any relevant socio-demographic research.

## **2. Responsibilities**

A) What are the common responsibilities shared by each partner?

Examples may be:

- Upholding the shared values of the project.
- Maintaining open and ongoing communication (attending meetings, timely response to voice or e-mail).
- Notifying partners of issues or concerns in a timely manner.
- Expectations about how each partner will be represented, how representatives will have capacity to enter into decision-making on behalf of their agencies, and how partners will replace representatives in the event of staff turnover or agency re-organization.
- Expectations about representatives making sure that all levels of their organizations (board members, management, program staff, and relevant volunteers) are regularly informed about their partnership commitments, achievements and responsibilities.
- Expectation that each partner organization will confirm their initial and ongoing participation in the project by obtaining ratification from their Boards on an annual basis.

B) What is the process for partners to withdraw from the partnership?

- For example, how much notice must be given to other partners? How will a withdrawing partner resolve any financial obligations?

C) What is the process to admit new members who may be interested in joining the partnership?

## **3) Project Management and Decision Making**

A) How will partners direct the project to ensure it meets its objectives?

- Will there be any “Executive” or “Steering Committee” or other group directing the project?
- Who will participate in this group? (Identify positions from each organization, not individuals.)

B) What are the terms of reference for the partners directing the partnership?

- For example, will all members be involved in day-to-day decisions about the operation of the project, or just key aspects like hiring and program design?
- Will all members be supervising staff directly?
- Will all members be empowered to determine the project budget and make changes when needed?
- Who will have responsibilities for chairing and developing agendas (rotating between partners or not)?

- C) How will this partnership make decisions?
- State general decision-making procedure. For example: “The group will strive for consensus in all its decisions. In instances where consensus is not possible, any member can request an issue be put to a vote where each partner is entitled to one vote and a simple majority will decide”.
  - Describe meeting notification and attendance procedure. For example: “All participants are provided with ample notice for meetings. Each organization will strive to send a representative who can accurately represent the agency. In the event that no representative is available, the agency position may be relayed to the meeting by fax, telephone, etc. However, the partners agree that decisions may be made without all agencies present”.
  - What steps will be taken to make decisions between meetings if they are required? For example: “In the event that decisions cannot be delayed until the next meeting, an emergency meeting can be arranged or e-mails, faxes or telephone calls may be made to members of the committee or workgroup”.
- D) Will there be any additional “program committees” directing the day-to-day operations of the project?
- If so, who will participate in these committees? (Identify positions from each organization, not individuals.)
  - How will this committee be linked with the partnership (for example joint meetings, representatives going to both groups)?
  - What are this committee’s key responsibilities?
- E) How will associated groups and institutions have a voice in program planning and direction?
- F) How will community members or program participants participate in program planning and direction?
- For example, will there be a forum for broader community input and information sharing about the project, such an advisory committee, or a series of community forums?

#### **4) Inter-Agency Communication**

- A) What will be the frequency of meetings for the partnership’s committees (e.g. steering committee or program committee)?
- *What notice needs to be given before meetings are called?*
- B) How will partners communicate between meetings – at both service-delivery and project management levels?
- For example, are all members on e-mail systems? Can conference calls be arranged?

- C) How will representatives maintain consistent communication within their organizations so that their board members, management, program staff, and relevant volunteers are clear about the project objectives and responsibilities?
- D) How will communication between front-line staff providing services, project supervisors, and those responsible for directing the project be maintained?

### **5) Conflict Resolution and Complaints**

- A) What steps will be taken to resolve differences if the group's regular decision-making or communications processes break down?
- Outline steps in the process and specify who has responsibilities for problem identification, discussion, resolution and documentation.
  - Include expectations regarding confidentiality.
  - Make sure the process builds on and does not conflict with any existing practices at each partner organization (including agency policies, collective agreements, professional Codes of Conduct and statutes/Legislation which will take precedence over the conflict resolution mechanisms outlined in the Memorandum of Understanding).
- B) Who has the responsibility for initiating problem-solving efforts if a partner or partners are not fulfilling their responsibilities?
- This responsibility should be shared by all partners, but some groups also find it helpful to designate a lead group or staff position that will pay close attention to group process and initiate problem-solving and conflict resolution in a timely matter.
- C) What is the process to have previous decisions re-opened for discussion?
- For example, "If a decision needs to be re-opened then it will be discussed in the committee or workgroup where the decision was made. The issue should be raised as an agenda item. The Chair should be notified in advance of this addition to the agenda".

### **6) Staff Hiring, Supervision and Training**

- A) If there is a staff-person assisting with project coordination, specify their major responsibilities and how they will be supervised.
- B) Who has responsibility for hiring staff that may be shared or seconded to work for the partnership?
- C) Who has responsibility for the supervision, direction and evaluation of staff?
- How do those responsible for staff supervision link with the project's steering committee?
  - Which partner's personnel policies will apply to the staff positions?
  - Who has responsibility for administering contracts with staff?
  - How will staff pay scales be determined?

D) How will new staff be trained? Will training and professional development opportunities be made available to existing staff seconded to work on the project?

### **7) Planning and Evaluation**

A) How will the partners evaluate the partnership activities and revise their project model or services?

- Timing for the planning cycle, for example, “yearly each September”?

B) Who should participate in evaluating the work, and how will they be involved?

C) Who has responsibility for collecting, tabulating and analysing data on program activity and outcomes?

D) How will the partners evaluate their satisfaction with the partnership and ensure partners’ needs are being met?

### **8) Finances and Administration**

A) Who is responsible for setting and changing the project budget?

B) Who is authorized to make spending decisions once the budget is set?

C) If funds are centralized, what is the procedure for accessing the funds?

- For example, how will supplies be purchased, how will staff be paid, who signs rental contracts for space or equipment?

D) If funds are de-centralized, what are partners’ responsibilities regarding documentation?

- For example, “each partner is responsible for keeping accurate records of any project, and will remit those records to the partner agency in a timely manner”.

E) Who will have responsibility for providing accounting services to the project?

- What are the expectations regarding the frequency of financial statements?
- How will the project funds be audited?

F) How will administrative support for the partnership be provided?

- List partnership administrative needs and whether costs will be provided by project dollars or from in-kind contributions.

### **9) Additional Policies**

A) Confidentiality

- For example, “Representatives on the Steering Committee and other partnership work groups shall not divulge personal or confidential information revealed to them by reason of their participation on those committees.”

B) Anti-discrimination

- Adapted from and consistent with existing policies of partner organizations.

C) *Access and Equity*

- Adapted from and consistent with existing policies of partner organizations.

D) *Media and Public Relations*

- The partners may want to develop specific guidelines for representing the partnership in public/media settings or when publishing information about the partnership.

## **II. SERVICE DELIVERY PLAN**

The Service Delivery Plan is a document appended to the Memorandum of Understanding that includes:

- Detailed description of the services and how they will be delivered (service delivery model), including the different responsibilities of each partner.
- Phases of implementation, timelines, and member's responsibilities with regard to each component of the service delivery.
- Objectives and anticipated outcomes for delivery of services, and indicators of success.
- Detailed project budget, which includes in-kind or financial contributions of all partners, and how funds will be dispersed to each of the partners.
- Evaluation plan for the program activities.
- How program statistics will be maintained and used.

## Appendix 7C.2 Sample Partnership Agreement

Source: Adapted from East Scarborough Storefront, "East Scarborough Storefront Agreement," *Welcome Package for Agencies*, 2001, pages 12-13.

### PARTNERSHIP AGREEMENT

**Full Agency Name:**

--

**Contact Person(s) Name(s):**

--

**Agency Address:**

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**Phone:**

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**Fax:**

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**Email:**

**The Partner Agency of [Your Agency Name] agrees to contribute to [Your Agency Name] by regularly attending group meetings and by (check at least one):**

- Providing regular direct service at [Your Agency Name]
- Hosting workshops or information sessions at least \_\_\_\_\_ times per year
- Working on committees or task groups
- Providing [Your Agency Name] with volunteers on an ongoing basis and actively participating in training volunteers
- Regularly performing outreach activities for the [Your Agency Name]
- Providing regular assistance with [Your Agency Name] facilities and substantial gifts in kind to the [Your Agency Name]
- Providing community development resources and organizational support on an ongoing and regular basis
- Specify \_\_\_\_\_

**Core Values of the Partnership:**

--

**Objectives and Outcomes:**

--

**Responsibilities and Contributions of [Your Agency Name]:**

--

I, \_\_\_\_\_ (name), on behalf of  
\_\_\_\_\_ (Partner Agency), verify that  
\_\_\_\_\_ (Partner Agency):

- Meets all licensing and legislative requirements to provide the service(s) outlined above and ensure that a qualified person(s) will carry out those service(s);
- Has attached a current certificate of insurance naming [Your Agency Name] as a location for the service(s) outlined above;
- Takes full responsibility for the activities its staff and volunteers facilitate at [Your Agency Name] and will provide [Your Agency Name] with statistical information about those activities;
- Will send all staff who provide direct service at [Your Agency Name] to a [Your Agency Name] orientation session; and
- Will send appropriate person to participate in quarterly [Your Agency Name] Meetings.

The Partnership will be reviewed in:      *Six months*       *One year*   
on \_\_\_\_\_ (DD/MM/YYYY).

Signature (Partner Agency): \_\_\_\_\_

Date: \_\_\_\_\_

Signature [Your Agency]: \_\_\_\_\_

Date: \_\_\_\_\_

## Appendix 7C.3 List of Protection of Privacy Legislation

### PROTECTION OF PRIVACY LEGISLATION

There are several federal, provincial, and municipal laws that govern individuals' right to privacy and protect personal information. Not all of these laws will apply to every drop-in.

When developing your own confidentiality policy, you should consult these laws to see which ones apply to your drop-in. Even if your drop-in does not strictly fall under the jurisdiction of these laws, you should still consult them to get a sense of what the basic rules and good practices are for protecting personal information.

**1. Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) (1990)**

[www.e-laws.gov.on.ca/DBLaws/Statutes/English/90m56\\_e.htm](http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90m56_e.htm)

**2. Provincial Freedom of Information and Protection of Privacy Act (FOIPOP) (1990)**

[www.e-laws.gov.on.ca/DBLaws/Statutes/English/90f31\\_e.htm](http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90f31_e.htm)

**3. Federal Personal Information Protection and Electronic Documents Act (PIPEDA) (2000)**

<http://laws.justice.gc.ca/en/p-8.6/93196.html>

**4. Provincial Personal Health Information and Protection Act (PHIPA) (2004)**

[www.e-laws.gov.on.ca/DBLaws/Statutes/English/04p03\\_e.htm](http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/04p03_e.htm)