

A close-up photograph of two people, a man and a woman, shaking hands over a wooden table. The man is on the left, wearing a dark suit, and the woman is on the right, wearing a dark blazer over a white top and a large gold necklace. They are both smiling. On the table, there are two coffee cups, one in a teal sleeve and one in a brown sleeve, and a small glass vase with dried flowers. The background is a bright window with a view of a city skyline.

## **SERVICE PARTNERSHIPS PLAYBOOK**

**Jurisdictional Collaboration to Improve the Client Experience**

# SERVICE PARTNERSHIPS PLAYBOOK

Jurisdictional Collaboration to Improve the Client Experience

Implement Partnerships.

## IDENTIFY NEEDS

Partnering for the win-win-win:

- Clients
- Partner
- Employees

## SUCCESSFUL PARTNERSHIPS

- Committed leadership
- Clear governance and accountability
- Relationship Management
- Shared Purpose and Culture
- Integrated Planning

## RIGHT PARTNER

- Organizational objectives
- Strengths and weaknesses
- Service areas conducive to collaboration
- Service gaps that a partner could fill
- Goals and expected outcomes

## EXPLORE MODELS

Different models for diverse needs:

- Cross Promotion
- Outreach
- Co-Location
- Integrated partnerships

## IMPLEMENT

- Develop Business Case
- Design the partnership
- Finalize the service partnership agreement
- Operationalize the model

## MEASURE SUCCESS

- Measure Performance
- Report Internally and Externally
- Evaluate the Partnership
- Learn and Continue experimenting
- Share the Results

Improve Client Experience.

Showcase, Replicate, Scale-up.

Continuous Integration.

## WHY SERVICE DELIVERY PARTNERSHIPS?

For the purposes of this guide, when we refer to partnership, we mean a service delivery partnership between different levels of government.

Increasingly governments are under pressure to deliver more and better service in a cost-effective manner. Successful partnerships provide a win-win-win value proposition for partners, clients and employees.

By partnering with other jurisdictions you can achieve the following:

### **PARTNER:**

- Provides opportunities to explore creative solutions to improve the client experience.
- Expands service reach by obtaining access to existing service delivery networks to enhance presence.
- Allows for cost-efficiencies and economies of scale.

### **CLIENT:**

- Provides more convenient access to services.
- Provides access to more integrated services.
- Improves responsiveness.
- Reduces need to know the level of government providing a service.
- Reduces potential stigma by blending programs and services together.
- Simplifies the take-up of benefits and services for vulnerable populations.

### **EMPLOYEES:**

- Increases employee satisfaction when working and office conditions are similar.
- Increases collaboration through shared space and common areas to improve services.
- Improves personal safety, particularly in rural and remote areas.

## ACKNOWLEDGEMENTS

Thank you to the members of the Public Sector Service Delivery Council and the partners who participated in the co-creation of this pan-Canadian guide



### Public Sector Service Delivery Council Members and Partners.

Government of British Columbia  
Government of Alberta  
Government of Saskatchewan  
Government of Manitoba  
Government of Ontario  
Government of Québec  
Government of New Brunswick  
Government of Nova Scotia  
Government of Newfoundland and Labrador  
Government of Yukon  
Government of Northwest Territories  
Municipal Service Delivery Officials – City of Waterloo  
Municipal Service Delivery Officials – Region of Peel  
Municipal Service Delivery Officials – York Region  
Canada Revenue Agency  
Employment and Social Development Canada  
Immigration, Refugees and Citizenship Canada  
Indigenous Services  
Innovation, Science and Economic Development  
Public Services and Procurement Canada  
Treasury Board of Canada Secretariat  
Veterans Affairs Canada

## GOOD RELATIONSHIPS MAKE A SUCCESSFUL PARTNERSHIP

There are some key elements that contribute to building a successful partnership<sup>1</sup>.

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### COMMITTED LEADERSHIP

- Commitment of leadership with the authority to assign the resources
- Commitment by leadership to champion the partnership
- Demonstrated commitment to delivering results at the working level

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### CLEAR GOVERNANCE AND ACCOUNTABILITY

- Commitment from leadership to define the overall framework
- Commitment from individuals within both organizations to explore the details of the operation together
- Commitment from both levels to be accountable to the plan as committed to by both parties

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### ONGOING RELATIONSHIP MANAGEMENT

- Ensure transparency in order to gain trust amongst the individuals that are working on this partnership
- Try to sustain a relationship outside of the context of this one project
- Conduct regular face-to-face meetings
- Check-in regularly to make sure that everyone continues to share the same vision for the partnership

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### SHARED PURPOSE AND CULTURE

- Develop a new shared culture for the partnership entity
- Both parties work closely together to identify the purpose, vision, objectives and performance measurements for the partnership
- Commit to ongoing communications and joint planning sessions to ensure the work stays on track

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### INTEGRATED PLANNING

- Conduct regular face-to-face meetings
- Commit to effectively and timely communications
- Confirm all staff competencies, where they will be located, and who they will report to
- Clear understanding of the implementation planning and the time frame for completion

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Establishing trusting relationships with other service providers in the community is key to strong partnerships.

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<sup>1</sup> Partnership Strategy for Horizontal Initiatives Partner Workbook

## THE PARTNERING PROCESS

The following chart outlines the steps to successfully implement a partnership<sup>2</sup>.



<sup>2</sup> Partnership Strategy for Horizontal Initiatives Partner Workbook

CROSS PROMOTION	OUTREACH	CO-LOCATION	INTEGRATED
<ul style="list-style-type: none"> <li>• Informal Cross Promotion (e.g. Atlantic provinces and SC, Service Outreach host sites)</li> <li>• Formal Cross Promotion (e.g. Labour Market Development Agreements, ATL)</li> </ul>	<ul style="list-style-type: none"> <li>• Virtual Outreach (e.g. Grand Manan)</li> <li>• Mobile Outreach (e.g. Northern Ontario Aboriginal Birth registration)</li> <li>• Scheduled Outreach (e.g. ICBC AutoPlan – Insurance Services)</li> </ul>	<ul style="list-style-type: none"> <li>• Shared Space (e.g. Picton, ON)</li> <li>• Shared Counter (e.g. Ottawa, ON)</li> </ul>	<ul style="list-style-type: none"> <li>• Integrated Payments (e.g. NB and OAS models)</li> <li>• Partial Integrated Agent (GNWT)</li> <li>• Digital Integration (e.g. SNB and Transport Canada)</li> </ul>

**Definition & Subtypes:** Creates a common nomenclature and helps identify subtypes for collaboration

**Best Practices:** Share lessons learned with partners

**Tools and Resources:** Save time and energy by providing examples of tools and resources for partners

**Case Studies:** Showcase successful model in more depth.



## OUTREACH

# Definition & Subtypes

### WHAT IS AN OUTREACH PARTNERSHIP?

A service outreach partnership is when two or more levels of government (could also include community partners and stakeholders) reach out to clients together to provide one access point for services.

### WHY PARTICIPATE IN AN OUTREACH PARTNERSHIP?

These partnerships help to ensure that Canadians receives necessary services regardless of their primary residential area, their mobility or means by working jointly with different service providers.

### WHO IS THE TARGET CLIENTELE FOR AN OUTREACH PARTNERSHIP?

All types of clients depending on the need. Outreach partnerships may target clients who have limited access to other service delivery channels e.g. Indigenous communities facing a difficult event. e.g. emergency situation or mass layoffs, and to join up services for a particular client spanning different service organizations.

### WHERE AND WHEN IS AN OUTREACH PARTNERSHIP MOST SUITABLE?

Works best when serving rural, remote and isolated communities and where client volumes do not support an in-person presence. Typically conducted on a regular basis, during emergencies, and for targeted promotion.

## There are three types of Outreach Partnerships

### SCHEDULED OUTREACH PARTNERSHIP

One level of government provides outreach services from an existing location of another level of government e.g. hosted outreach. Typically outreach services are part-time and can range from weekly, monthly or annual visits.

### MOBILE OUTREACH PARTNERSHIP

There are two types:

**Targeted:** For clients with specific needs. These are usually mobile where service organizations would present at a community event.

**Rapid Response Outreach:** For communities experiencing exceptional needs such as a mass layoff and emergency responses e.g. floods, fires and postal delays. Service partners use their established tools and resources to respond quickly and efficiently together.

### VIRTUAL OUTREACH PARTNERSHIP

Outreach services are provided through digital mediums such as videoconference, WebEx, or teleconference.

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Outreach partnerships should:

- Improve access to services for clients
  - Support emergency response
  - Promote and provide information on programs and services
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# Best Practices and Area of Focus

- Accommodations/Office Space And Property Management
- Communications (Internal, External)
- Equipment, Technology And Supplies (Computers, Networks, Phones, Photocopiers, Office Supplies, Equipment Maintenance, Etc.)
- Financial (Cost Sharing, Etc.)
- Information Management/ Privacy And Access To Information
- Operations (Service Standards, Hours Of Operation, Official Language Requirements, Parking, Etc.)
- Performance Measurement And Evaluation
- Security (Personnel, Site, Assets, Etc.)
- Services Provided

# Outreach Partnerships Best practices

## OUTREACH PARTNERSHIPS TO INDIGENOUS COMMUNITIES



Examples emphasize and reinforce best practices

### ABORIGINAL BIRTH REGISTRATION INITIATIVE (ABRI)

An ongoing Service Canada and Service Ontario partnership that uses Service Canada's existing Scheduled Outreach network to provide access to Birth Registration and Birth Certificate information in Indigenous communities. The bulk of service provided under this initiative is sharing general information about the birth certificate process and encouraging clients to complete the process by sharing information about the range of benefits and services linked to primary identity (i.e. CCB). Additional support is provided in cases where a client's birth has yet to be registered with province as this is a precursor to issuance of any identity documentation (and may affect the client's ability to register with the INAC as a status Indian in some cases).

### INDIGENOUS COMMUNITIES

- Respect Indigenous communities preference determining logistical set-up.
- Develop a communication strategy specific to Indigenous communities. For example, given that the regular channels of communication are not always efficient at reaching all members of the community, the use of local broadcasting should be considered.
- Involve/hire Indigenous people from the community in the delivery of services facilitates communication and builds trust.
- Train members of the community as a contact person to support community members facing difficulties in applying for a program.
- Ensure that employees are culturally sensitive and flexible, available to travel for short and long term periods.

### EQUIPMENT, TECHNOLOGY AND SUPPLIES (COMPUTERS, NETWORKS, PHONES, PHOTOCOPIERS, OFFICE SUPPLIES, EQUIPMENT MAINTENANCE, ETC.)

- Have reliable hardware, given the likely need to travel with a laptop, printer and satellite cell phone
- Conduct routine testing of all equipment to ensure and maintain in good working order.
- Ensure there is internet access or you will need to transport any paper forms etc.

### SECURITY (PERSONNEL, SITE, ASSETS, ETC.)

- Implement security measures to address employee safety and privacy of personal information carried by agents e.g. if driving have an emergency tool kit

# Tools & Resources

- MoU, Service Agreement Template
- Joint Rapid Response Action Plan
- Threat and Risk Assessment
- Emergency Tool Kit for the Road Checklist

**MEMORANDUM OF UNDERSTANDING**

**DRAFT** **Date**

This Memorandum of Understanding is made this \_\_\_\_ day of \_\_\_\_\_, 20XX.

Between: **ORGANIZATION A**

And: **ORGANIZATION B**

Herein after, known as the "Parties"

**BACKGROUND**

WHEREAS:

A. This memorandum of understanding ("MOU") is intended to set out the roles and responsibilities of the Parties for the delivery of services described herein.

B. The Parties intend that this MOU describe the delivery of services, the level of service to be provided and any necessary mechanisms for managing the matters governed by this MOU.

C. This MOU supersedes and replaces any and all previous agreements between the Parties.

D. To the extent some of the services described in this MOU may have been delivered during periods prior to the date of this MOU the Parties intend that this MOU apply to those services whether delivered prior to or after the date of this MOU.

E. *[Any other background fact may be inserted here however most of the important background will already be known to the Parties and it is therefore not necessary to repeat such facts in an MOU unless they establish or clarify a legal circumstance on which some part of the content of the MOU depends.]*

**NOW, THEREFORE**, the Parties hereto agree as follows:

**1. Definitions**

1.1 In this MOU, unless the context requires otherwise:

"Services" means those services described in **Schedule A**.

**2. Services**

2.1 The following schedules form part of this MOU:

## GRAND MANAN ISLAND – VIRTUAL SERVICE DELIVERY

**BACKGROUND**

Service Canada Atlantic is exploring transitioning from a Scheduled Outreach model to a Virtual Service Delivery model to better serve clients in the community of Grand Manan, New Brunswick (NB). Grand Manan is an island community of approx. 2,500 located 50 kilometers off the southwest coast of NB. It is accessible by charter aircraft or via a 90 minute ferry crossing. Bad weather and traffic load often extend crossing time considerably. Service Canada currently provides services to the Island through in-person Scheduled Outreach one day a month.

Scheduled Outreach client volumes are very low; 110 clients in total for 2016-17. As noted, reliable access to and from this community can be challenging and resource intensive. Service NB has a full time site on the Island and preliminary discussions indicate this could serve as a virtual service host site. The optimal virtual service model remains to be determined but the host site could provide access to Government of Canada documentation, Client Access Work Station (CAWS) system access, and video/audio link to Service Canada Citizen Service Officers. In addition to reducing the need for routine staff/client travel and the potential for employees working alone, this initiative could significantly improve service access and awareness for clients in Grand Manan.

**OBJECTIVES**

This initiative advances 4 objectives:

- Provides clients in Grand Manan with more consistent, accessible service access;
- Builds on each other's partnership and service delivery collaboration network;
- Leverages recent experience, knowledge and capacity for virtual service delivery;
- Supports staff health and safety and better manages limited service resources.

**STATUS, RESULTS & NEXT STEPS**

A number of critical issues still need to be resolved many of which will draw on an expanded scope of expertise from both partner organizations. Among these concerns are technology and network connectivity, privacy and protection of information, security, client queuing, space rental cost and space for possible Citizen Access Works Stations.

The service organisations are considering approval of the transition to a Virtual Service Delivery model for Grand Manan. Once approved, advancement of the transition will require clarification and alignment of the site logistics noted above with virtual service delivery protocols being developed nationally. With these benchmarks in place, more formal discussions regarding Grand Manan host-site details can then be initiated.

# DISCUSSION

- How are jurisdictions planning to use this Guide?
- Are we focused on the right content?
- Are members comfortable with the proposed approach for validation?