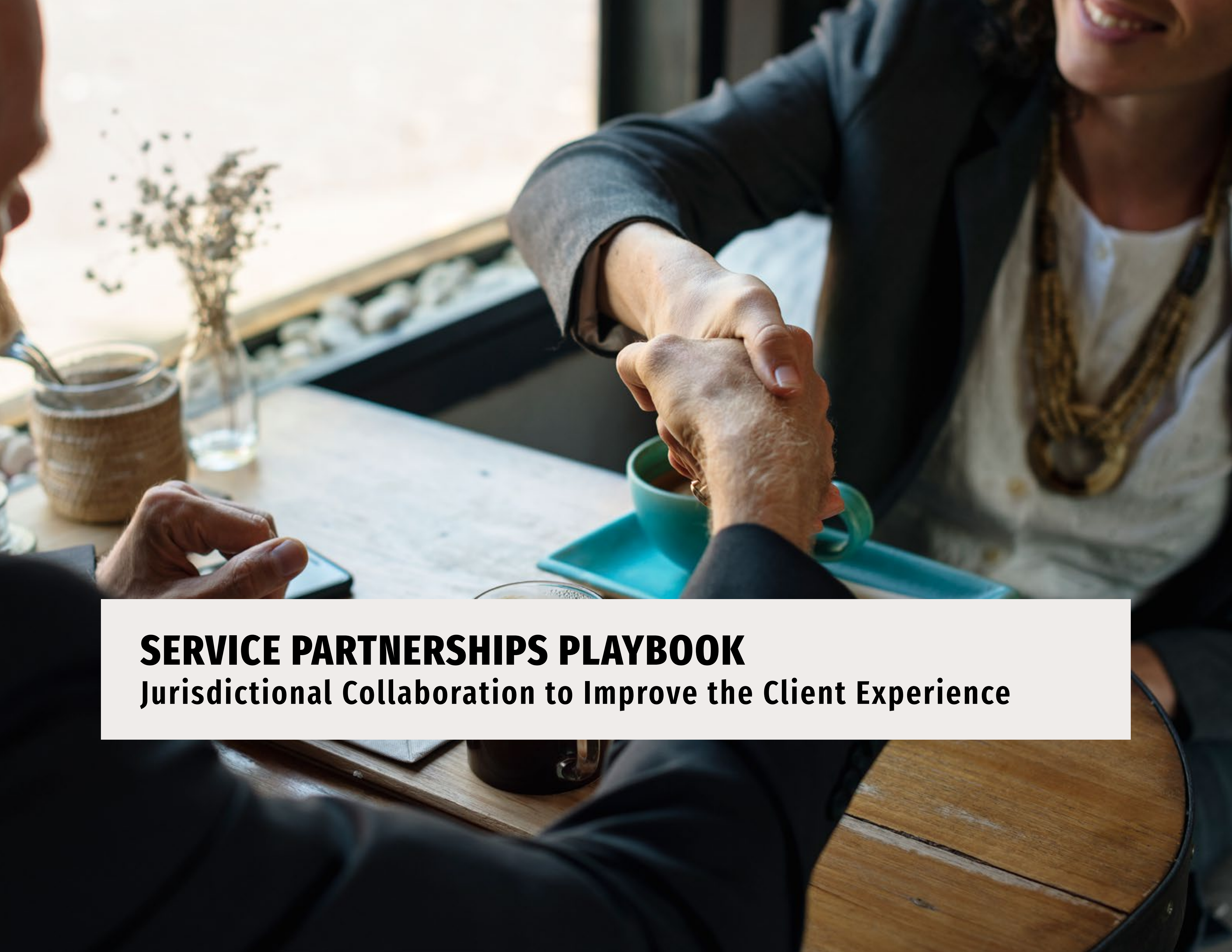


SERVICE PARTNERSHIPS PLAYBOOK

Jurisdictional Collaboration to Improve the Client Experience

FOREWORD

Canadians' expectations of government are increasing. They expect governments to be working together to integrate services and want seamless, simple, services regardless of which level of government is providing the service. All jurisdictions recognize the need to provide client-centric services. This means providing services together, whenever possible, given that we are serving the same clients

Although there are many challenges to integration our clients are asking for services to be made simpler and more accessible. Many integrated service models options in jurisdictions are in their infancy, giving jurisdictions opportunities to partner and leapfrog on each other's achievements. There are many service solutions jurisdictions can be working on together while legislation, IT infrastructure, and technologies catch up to client expectations.

As the DM Champion for Service Network Collaboration, I am pleased to share with you the **Service Partnership Playbook: Jurisdictional Collaboration to Improve the Client Experience** developed by the Public Sector Service Delivery Council. The Playbook showcases best practices and lessons learned from existing and new innovative partnerships in service delivery. It is a comprehensive toolkit and is intended to provide a roadmap for anyone looking for advice on how to develop successful intergovernmental service partnerships. It shows how jurisdictions can replicate and / or scale up innovation occurring throughout the country and provides a rich variety of innovative service partnerships underway. It will walk you through practical solutions and innovative partnerships to help inform the establishment of future partnership arrangements.

This Service Partnership Playbook was developed to support the work of the Service Network Collaboration (SNC) initiative, which aims to improve client experience by delivering seamless integrated services across all levels of government and leveraging jurisdictions' service delivery networks.

The development of this Playbook was made possible by the generosity of PSSDC members and partners who have shared extensively on their experiences with partnership. This guide is informed by their experiences in partnering with other levels of government and includes feedback of both senior management and working-level employees with knowledge of day-to-day operations.

I encourage jurisdictions to use the Playbook and to continue to identify future service partnerships to focus PSSDC service integration efforts over the longer-term.

Thanks,

Alan Roy, Service New Brunswick
DM Champion for Service Network Collaboration

TABLE OF CONTENTS

INTRODUCTION

INTRODUCTION

This guide is intended to provide you with a solid approach to partnering that will help you identify, engage, and manage service delivery partnerships.

The goal is to build strong and healthy partnerships that lead to customer service excellence while at the same time streamlining the resources needed for initiatives across various jurisdictions.

Within this guide you will find information on **why you would partner, how best to partner, how to identify the right partner and how to implement a successful partnership.** In addition, the guide outlines four partnership models to be explored and the resources necessary to make those kinds of partnerships successful. Throughout the guide you will be able to access tools, resources and case studies that will assist you in your partnership planning.

This guide is available online and via interactive PDF.

While navigating

the guide look for the following icons for checklists, examples and advice from the experts:

CHECKLIST

Factors to consider when implementing the process described

EXAMPLES

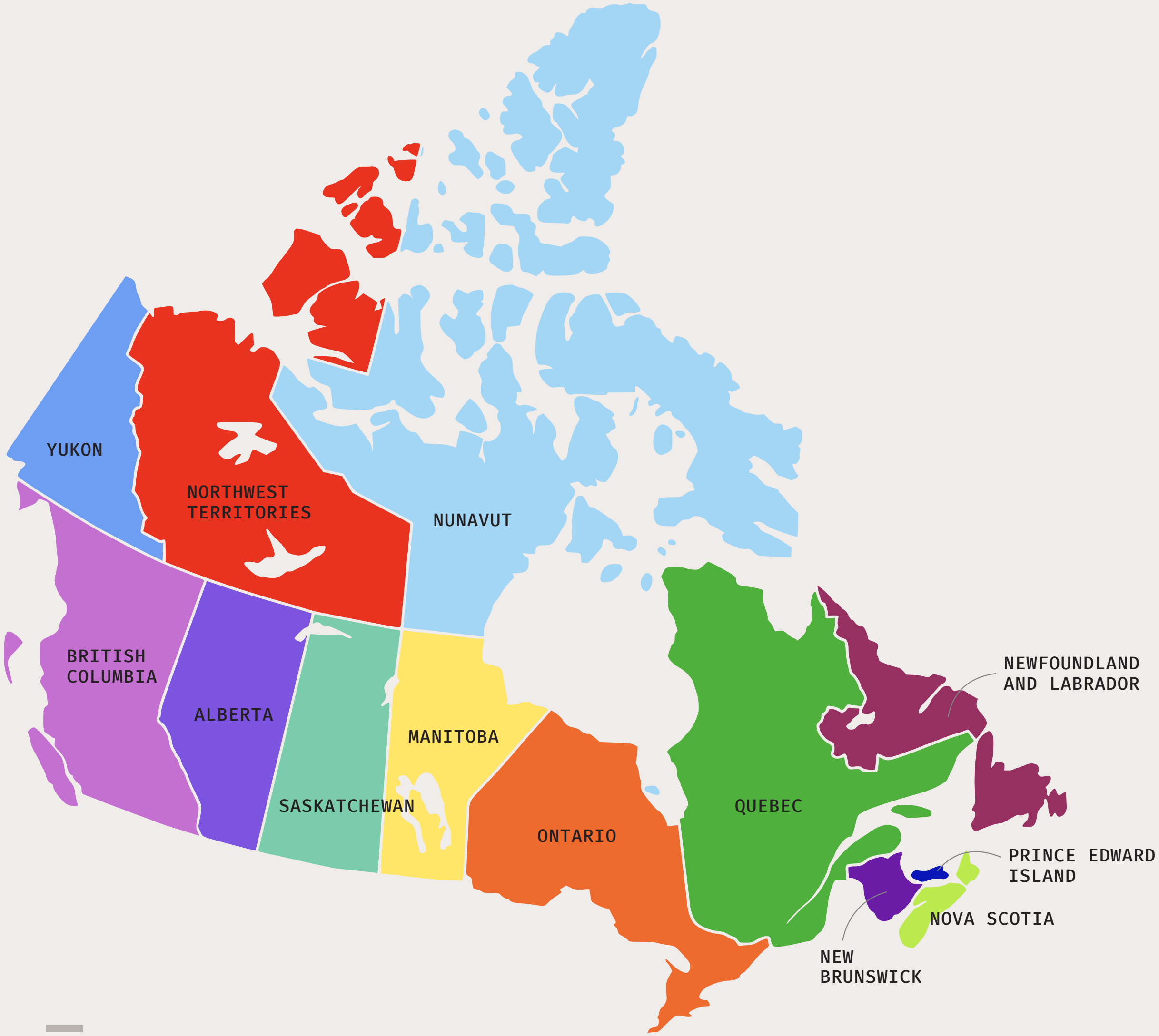
Examples from existing partnerships to bring to life the concepts explained in each step

ADVICE FROM THE EXPERTS

Based on our research and interviews with subject matter experts, we offer you advice throughout the guide

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

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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

WHY SERVICE DELIVERY PARTNERSHIPS?

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.

GOOD RELATIONSHIPS MAKE A SUCCESSFUL PARTNERSHIP

GOOD RELATIONSHIPS MAKE A SUCCESSFUL PARTNERSHIP

There are some key elements that contribute to building a successful partnership[1].

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

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

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

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

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

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

[1] Partnership Strategy for Horizontal Initiatives Partner Workbook

THE PARTNERING PROCESS

THE PARTNERING PROCESS

The following chart outlines the steps to successfully implement a partnership[2].

STEP 1 — IDENTIFY GOALS

- Articulate a clear set of organizational priorities, objectives and expected outcomes
- Take an inventory of where you need support and why, and what you have to offer to potential partners
- Identify areas conducive to partnerships

STEP 2 — IDENTIFY POTENTIAL PARTNERSHIPS

- Leverage your networks and trusted relationships
- Use data analytics
- Develop an understanding of the objectives, priorities, strengths and weakness of potential partners

STEP 3 — PREPARE TO PARTNER

- Frame the partnership from your partner's viewpoint
- Identify the value proposition for clients, partners and employees

STEP 4 — DEVELOP THE PARTNERSHIP

- Explore the opportunity and create a level of interest
- Develop the framework
- Create a high level operational vision
- Complete due diligence / feasibility and understand the implications of the partnership

STEP 5 — FINALIZE THE AGREEMENT

- Create the timelines, finalizing the resources and infrastructure
- Finalize the details of the terms and conditions

STEP 6 — IMPLEMENT THE PARTNERSHIP

- Execute project plan and related components e.g. governance, communications, human resources, facilities, security, privacy, operations, cost sharing model

STEP 7 — EVALUATE AND CORRECT

- Conduct a partnership health check
- Prepare and implement an action plan based on results

[2] Partnership Strategy for Horizontal Initiatives Partner Workbook

BEST PRACTICES FOR IMPLEMENTATION

BEST PRACTICES FOR IMPLEMENTATION

The following are some best practices to consider when implementing the partnership:

- Use predictive analytics to identify opportunities e.g. the points of service mapping tool, lease dates, client and employee feedback
- Confirm the problem to be solved or improvement to be made
- Identify the value proposition for clients, partners and employees.
- Plan for urban growth, shifts in demographic composition and changing client expectations and complex needs
- Confirm areas of interest for partnering, as well as the purpose and objectives
- Conduct a feasibility study e.g. confirm co-location site such as size, layout, insurance, parking, noise, anticipated client volumes, etc.
- Set up a governance structure e.g. committee or a project team to oversee the whole process
- Evaluate a framework to develop a cost-sharing model
- Develop a security plan including site visits, while considering bandwidth, connectivity, firewall security for standardization
- Develop a communications plan (internal and external signage, messaging to staff, meet & greets, communicating with the community)
- Develop a coordinated human resources plan (staffing, training, health, labour relations, dispute resolution protocol, etc.)
- Engage with facilities and infrastructure leads to plan the layout: offices (cublicles or open space?), counters, board rooms, equipment (computers, networks, phones, photocopiers, shredding services, office supplies, maintenance, etc.), lunch room, etc.
- Establish MOU/Agreement: Develop and sign off any required leases / develop an accessibility plan / finalize service level agreement, including service standards, hours of operation, official language requirements, parking
- A best practice is to include sunsetting criteria in the service agreement being developed

The Regional Municipality of York has used expertise in data and location analytics to help identify potential partnership opportunities and develop a community hub framework. They have been able to do this by demonstrating, in an evidence-based manner, why certain programs and services would be successful if they were co-located in certain communities. They reviewed data and trends in the environment to understand what services the community needed, they were able to plan for urban growth and shifts in demographic composition and changing client expectations and complex needs. Using an evidence-based approach allowed them to be more strategic and deliberate around forming partnerships and delivering integrated client-focused services.

See Community Hubs Development Framework for Community and Health Services in Appendices.

BEST PRACTICES FOR IMPLEMENTATION

TOOLS AND RESOURCES

INTRODUCTION TO PARTNERSHIP MODELS

INTRODUCTION TO PARTNERSHIP MODELS

The partnership models discussed in this Guide exist on a continuum of collaboration from Cross Promotion to Integrated[2].

THE COLLABORATION CONTINUUM

TRUST

Competition	Co-exist	Communicate	Cooperate	Coordinate	Collaborate	Integrate
Competition for clients, resources, partners, public attention.	No systematic connection between agencies.	Inter-agency information sharing (e.g. networking).	As needed, often informal, interaction, on discrete activities or projects.	Organizations systematically adjust and align work with each other for greater outcomes.	Longer term interaction based on shared mission, goals; shared decisionmakers and resources.	Fully integrated programs, planning, funding.

TURF

LOOSE ↔ TIGHT

[2] Tamarack Institute

INTRODUCTION TO PARTNERSHIP MODELS

In this section we will look at the four partnership models:

CROSS PROMOTION	OUTREACH	CO-LOCATION	INTEGRATED

Within each, we will explore:

- **Definition & Subtypes**
- **Best Practices**
- **Tools & Resources**
- **Case Studies**

Introduction to Partnership Models

CROSS PROMOTION

CROSS PROMOTION

Definition & Subtypes

WHAT IS A CROSS PROMOTION PARTNERSHIP?

One level of government promotes programs and services of another level of government.

WHY PARTICIPATE IN CROSS PROMOTION?

To improve the take-up of related services or programs across levels of government and to facilitate client access. To be proactive in anticipating client needs.

WHO IS THE TARGET CLIENTELE FOR CROSS PROMOTION?

Clients seeking related services that cross levels of government e.g. newcomer (SIN, Health Card, Driver's license)

WHERE IS CROSS PROMOTION MOST SUITABLE?

All channels

WHEN IS CROSS PROMOTION IDEAL?

Anytime

There are two types of Cross Promotion Partnerships

INFORMAL CROSS PROMOTION

One level of government promotes programs and services of another level of government through referrals, citizen service officer referrals or by posting information. Informal agreements are often based on close relationships with other Federal/Provincial/Municipal departments, non-profit organizations, Indigenous groups, or settlement agencies that may be serving the same groups.

Example:

In the Atlantic provinces, on an informal basis, Service Outreach host sites often support/promote Government of Canada services in advance of scheduled site visits or to promote virtual service delivery.

FORMAL CROSS PROMOTION

One level of government has formal agreements (Memorandum of Understanding - MOU) with another level of government to share service information with Canadians. Formal agreements are largely in place to support program and service delivery across jurisdictions with the goal to improve efficiencies for the organization.

Example:

In the Atlantic Region, formal partnerships are in place to support Labour Market Development Agreements (LMDA) through the promotion and delivery of programs and services across federal and provincial administrations. For example to better coordinate the delivery of their respective labour market programs, Nova Scotia as co-located with Service Canada, ESDC at 13 locations to offer its labour market programs

Service Canada provides front-end (i.e. in-person) reception, information and referral services to clients seeking to access Nova Scotia's labour market programs and services. Nova Scotia provides appropriate training to Service Canada's front-end employees when required. The parties collaborate in the development of a detailed process for the delivery of front-end services (ex: communication protocols).

Best Practices

- Staff in both organizations are engaged through on-going training and communication
- The depth and type of information being shared in cross-promotional training is appropriate, focusing on general information and referral
- Reference materials are up to date
- Is supported through strong collaboration and governance at all levels; from local to regional collaboration and governance
- Referring clients to sites with lower wait times in addition to the closest location

Introduction to Partnership Models

OUTREACH

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.

Outreach partnerships should:

- Improve access to services for clients
- Support emergency response
- Promote and provide information on programs and services

Best Practices

ACCOMMODATIONS/OFFICE SPACE AND PROPERTY MANAGEMENT

- Whenever possible each organization should make arrangements with the host the maintenance of their respective area(s)
- The host is responsible for set-up to provide set-up space and storage areas

COMMUNICATIONS (INTERNAL, EXTERNAL)

- Name-tags/photo ID cards must be worn at all times while on site
- In the case of mobile outreach in isolated or remote areas, provide a cellular or satellite telephone to all employees required to travel
- Strong communication at the local management level can ensure visiting staff are aware of procedures associated with the host site (i.e. emergency procedures)

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

- Routine testing of all equipment to ensure and maintain in good working order.
- If an automobile is being used, briefcases, containers or valuable equipment (e.g. laptop computers) must be placed in the locked trunk or, where this is not possible, out of sight while ensuring the automobile is locked.
- When there is a requirement to travel (e.g. by train or plane) with documents too bulky to be carried in locked briefcases, documents must be sent in a secure approved container that is checked in before departure.
- The Manager will need to ensure that the following requirements are included in the overall assessment: valid driver's license / insurance; vehicle walk-around inspection; emergency tool kit (flares, flashlight, batteries, matches, candles, booster cables, chocolate, water, wool blanket, cones, etc.); inclement weather conditions (required equipment e.g. snow tires, shovel); roadside; emergency contact numbers (local police, ambulance, fire, CAA, host site, etc.); road maps; alternate route guidelines. This is too long – convert to a checklist tool at the end of the outreach section.
- 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.

FINANCIAL (COST SHARING, ETC.)

- Provide standard and fair compensation for scheduled outreach

INFORMATION MANAGEMENT/ PRIVACY AND ACCESS TO INFORMATION

- Employees are responsible for the protection of sensitive information and valuable assets under their control in the conduct of providing outreach services. This includes the use of equipment.
- If public transportation is used, sensitive information and valuable assets must be stored in briefcases or containers and kept in the passenger area and under visual control at all times. Sensitive documents must not be exposed at any given time.

Best Practices

OPERATIONS (SERVICE STANDARDS, HOURS OF OPERATION, OFFICIAL LANGUAGE REQUIREMENTS, PARKING, ETC.)

- Harmonized hours during outreach assists in alleviating operational issues and enhances cross- promotion between organizations
- Well defined operational and administrative roles and responsibilities can optimize staffing and operations (i.e. having one welcome point for both organizations)

PERFORMANCE MEASUREMENT AND EVALUATION

- Many F-P/T partners have shown interest in learning about the pilots to tttt serve vulnerable populations and citizens living in rural/remote areas.

SECURITY (PERSONNEL, SITE, ASSETS, ETC.)

- Threat and risk considerations on each site should include: personnel security, access control, workstation design (egress)
- Each organization is expected to comply with respective security and privacy requirements.
- Training and awareness for staff on security procedures and incident reporting is highly recommended.
- A security threat and risk assessment must be completed anytime there is a change to existing operations, service offerings and/or locations, site refits and/or redesigns
- The Director or delegate is required to develop, test and maintain emergency plans for their offices to protect employees and clients, and safeguard sensitive information and assets during emergencies.
- Security contingency plans are to include such emergencies as: fire; natural disasters; bomb threats; unauthorized occupations; break and enters; and other unforeseen incidents.
- Implement security measures to address employee safety and privacy of personal information carried by agents e.g. if driving have an emergency tool kit

SERVICES PROVIDED

- It is important that employees and managers are familiar with the mandate and obligation of their organizations particularly with respect to Indigenous communities, to fulfill the expectations in serving the public

KEY TAKEAWAYS

- This model is particularly convenient in the context of service delivery either in remote or isolated areas. It is a versatile approach to optimally serve communities by answering their spontaneous requests, including providing information by the intermediary of a learning session.
- Using outreach is of interest when no service centre is located in the nearest town, because it ensures a physical governmental presence.
- This model of service provision allows for more flexibility since official service delivery models are generally not expected to be replicated in both remote and isolated regions, as they are not suitable.
- A clear branding is necessary to distinguish the partners involved in the delivery in due respect of the competencies of every government' level, which is of high importance.
- Bringing the equipment and supplies necessary for the delivery (laptop, printers, satellite phone and forms) is essential for the agents to be autonomous and to be able provide quality service

Best Practices

- Security issues are always at the forefront when delivering services under this model. Some security measures need to be taken to ensure the physical security of employees and the protection of confidential citizen information.
- In the case of a targeted outreach, a case by case approach needs to be adopted within each community

OUTREACH PARTNERSHIPS TO 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.

Example

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).

PARTNERSHIPS IN NORTHERN ONTARIO HIGHLIGHTING INNOVATIVE PROGRAMS TO SERVICE INDIGENOUS CLIENTS

Three models delivered in Northern Ontario recognize the 'connected' nature of federal and provincial programs and services and the important role that indigenous communities, particularly remote, fly-in, communities, have in the delivery of service to a common client group.

- Aboriginal Birth Registry Initiative (ABRI) with scheduled Outreach network that provides access to Birth Registration and Birth Certificate information and that encourages clients to complete the process (Service Ontario and Service Canada)
- Northern Ontario Remote Community Access Initiative (NORCA) employs individuals from communities as Citizen Service Agents in 28 remote First Nations Schedule Outreach sites.
- Service Canada with the Ministry of Transportation (MTO) are supporting the pilot implementation of G1 Drivers' License testing in remote First Nations targeted at youth and the general public.to share general information

Tools & Resources

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

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.

Case Studies

NAIN REMOTE INDIGENOUS OUTREACH PROJECT

BACKGROUND

In partnership with the Nunatsiavut Government, the department has initiated a pilot project to enhance services and improve interactions between community members and government officials through the hiring of a community-member to act as a facilitator/translator.

Service Canada Atlantic Region has a Memorandum of Understanding with the Nunatsiavut Government piloting a virtual outreach project in the community of Nain, Labrador to provide residents with assistance and information regarding ESDC's programs and services. Service Canada hired a resident of Nain as a casual employee to work one day per month, acting as a facilitator/translator between the residents of Nain and Service Canada staff in the SCC Happy Valley-Goose Bay office.

Costs for pilot have been nominal — $200/month in salary costs; premises, furniture and equipment are provided to Service Canada at no cost.

OBJECTIVES

- Pilot an initiative to enhance service by improving the accessibility of information and support for programs and services in remote communities.
- Engage in partnership arrangements with Indigenous organizations.
- Apply lessons learned to an expanded virtual service delivery.

STATUS, RESULTS AND NEXT STEPS

- The pilot started January 13, 2015.
- The agreement MOU has been extended a number of times, most recently to June 2018.
- The Nunatsiavut Government will be completing their own review of the pilot project in January 2018 and their findings will help inform a Service Canada evaluation anticipated for May 2018.
- Expansion of the initiative to 2 days per week and encompassing a number of adjacent communities will be explored in the 2018-19.

Case Studies

ICBC AutoPlan – Insurance Services

BACKGROUND

- The Insurance Corporation of British Columbia is a provincial Crown Corporation that provides compulsory and optional public automobile insurance.
- All vehicles operating in BC must be covered by ICBC's basic third party liability which is purchased through independent Brokers across the Province.
- Rural and remote communities of Atlin, Dease Lake and Stewart do not have independent ICBC Brokers so Service BC provides this service.
- Without SBC providing these services customers would have to travel up to 1200 kms round trip to obtain these services.
- The partners are Service BC and ICBC
- Atlin and Dease Lake have provided this service for many years, Stewart began offering the service in 2014
- Service BC earns a commission on the vehicle insurance sold in these locations

OBJECTIVES

The main objective of this partnership is to ensure that customers in the far northern isolated communities of the Province have access to AutoPlan services as they are not otherwise available in the area. Service BC Offices are able to provide knowledgeable and reliable services to their communities. Service BC provides these services cost efficiently and in an integrated service delivery manner.

STATUS, RESULTS, NEXT STEPS

Additional staff have been enrolled in AutoPlan training to better support the current AutoPlan offices.

Providing AutoPlan in these three communities has been extremely successful, customer feedback has been positive.

Introduction to Partnership Models

CO-LOCATION

CO-LOCATION

Definition & Subtypes

WHAT IS CO-LOCATION?

Levels of government operate out of the same point of service with a shared entrance for clients.

WHY PARTICIPATE IN CO-LOCATION?

Ideal for small rural sites where there are currently only one or two citizen service officers. Increasing the number of employees increases employee safety and support.

WHO IS THE TARGET CLIENTELE FOR CO-LOCATION?

Vulnerable populations e.g. seniors, Indigenous, disabled, who may have limited access or ability to use other channels.

WHERE IS CO-LOCATION MOST SUITABLE?

Recommended for rural areas. In urban areas co-location may not be as advantageous when a site has high client volumes.

WHEN IS CO-LOCATION IDEAL?

For sustainability of the in-person presence in lower transaction volume communities.

There are two types of Co-Location Partnerships

SHARED SPACE

Levels of government operate out of the same service point, but exclusively deliver their respective services.

Depending on each building and each situation, both parties may have to consider sharing areas including:

- Client-related space such as customer waiting room, customer writing tables, self-service work stations and restrooms
- Staff-related space such as kitchenettes/lunch rooms and telephone stations
- Secured areas for privacy of highly sensitive information (the back office, computer room, etc.)

SHARED COUNTER

The point of service operates as one unit, with a triaging queue system, but clients are provided programs and services by the respective level of government.

CO-LOCATION

Best Practices

ACCOMMODATIONS/OFFICE SPACE AND PROPERTY MANAGEMENT

- As multiple stakeholders are involved in establishing a co-located site collaboration and engagement are critical for successful implementation
- Consider design and layout as early as possible and include front-line staff in the design to optimize the experience for clients and staff
- In an integrated office environment, each group's layout guidelines have to be respected without negatively impacting the other's operation
- Differences between provincial and federal building codes and standards need to be taken into consideration when determining accommodation requirements
- There must be an attempt to streamline design where possible to avoid client confusion. Also, inconsistent design looks unprofessional
- Separate counters should be placed far enough away so cannot hear each others transactions (client privacy)
- Provide employees with similar office conditions and supplies to maximize employee satisfaction. Radically different office standards cause employee tension; for example, when one group has an open concept/cubicle layout and the other has closed offices.
- Assign clear responsibility for daily maintenance e.g. cleaning, basic issues, and communications with the landlord
- The responsibility for daily cleaning, addressing basic maintenance issues, and communicating with the landlord has to be clearly assigned to avoid confusion and duplication of effort.
- Employees need to know who the site lead is so that site issues are reported, documented, and resolved properly (i.e. heat, light, plumbing, etc)
- In locations where both groups share training areas, lunch rooms, board rooms, video conference or equipment, someone must take the lead for scheduling and resolving scheduling conflicts
- From a wellness perspective, sharing kitchen and break rooms allow employees from both groups to network and establish positive relationships. From a business perspective, very easy to find answers relating to partner programs

COLLECTIVE / STRUCTURAL AGREEMENTS

- The differences in structural models and collective agreement should be reviewed and where there are differences then explanations provided to employees. (e.g. Pay levels are different for similar work)
- Consideration needs to be made for obligations to partners when negotiating and agreeing to financial arrangements

CLIENT PAYMENT METHODS

- If both groups accept different types of payment, there should be a response mechanism in place for addressing client questions and complaints. Physical security issues may also be raised if one group accepts significant amounts of cash payment and the other does not

COMMUNICATIONS (INTERNAL, EXTERNAL)

- Clarify roles and responsibilities
- Keep open communication channels.
- Confirm the sensitivity of information to be share e.g. press release organizations
- Provide cross-training and on-going training

Best Practices

- Proactive and timely communication between changes or new information at all levels
- Provide a resource person for clients e.g. greeter to facilitate their orientation
- Identify a resource person from the other level of as "go to" person for employee questions
- Develop a joint communications and engagement plan for internal and external audiences which includes focus on staff needs and change management. Effective tools include joint engagement sessions and governance at local and regional levels as well as ongoing communication between local management

EQUIPMENT, TECHNOLOGY AND SUPPLIES (COMPUTERS, NETWORKS, PHONES, PHOTOCOPIERS, OFFICE SUPPLIES, EQUIPMENT

- Different network providers and infrastructure may have to co-exist, or if shared, system requirements (bandwidth, connectivity, firewall security) will have to be standardized to accommodate both groups' network policies
- An approved, standard, joint queuing system can assist in directing clients in an efficient manner
- Include mechanisms for employee self-service (like tablets to improve the overall client experience)

GREETING & DIRECTING CLIENTS

- At the point of entry, the process and flow of client traffic needs to be carefully planned. Who is responsible for directing clients? Are there two greeters or will signage be used instead?
- If employees from both groups will share greeting duties, need to determine how will they handle general questions regarding the other service offering?
- If a single greeter, comprehensive training required with supporting material e.g. checklist to properly direct clients

MAINTENANCE, ETC.

- Keep in mind that Service Canada is responsible for their own networking and computers and supplies.
- It is always better to use computers and other equipment related to NTIC (new technologies of information and communication) because they can contribute to improving service to citizens e.g. the absence of wireless (no mobile service, no usage of tablets) has been perceived as a delayed development of an optimal service.

FINANCIAL (COST SHARING, ETC.)

- How to share costs and transfer costs between organizations is complex and needs to be understood at the outset.
- Indications about the daily spending, the sources of revenues and the redistribution of income are recommended, as well as the arrangement to be followed if ending the partnership
- It is essential to set up a timeline for the establishment of the management of the partnership: budgets of organizations, financial arrangements, etc
- Contracts, lease documents, and other written agreements must indicate who is responsible for the payment of rent, cleaning and maintenance, and other site-related expenses

Best Practices

PROJECT MANAGEMENT

- Involve Program leads such as local managers and staff, security leads, privacy leads, facilities leads, senior executives for approvals, updates, spending authority.
- The implication of employees at every stage of the project is important to make sure that the conceived model matches with the operational needs.
- Managers have a principal role for the daily functioning of the organization. It has been mentioned that they should be implicated in every aspect of management.
- Establish working group to develop Service Agreement and to review documents from legal, privacy, and the program areas.
- Stakeholders need to be provided with an opportunity to shape the planning

HUMAN RESOURCES (STAFFING, TRAINING, OCCUPATIONAL HEALTH AND SAFETY, LABOUR RELATIONS, ETC.)

- The sharing of responsibilities between the different parts implicated must be clarified, notably with regard to operations and the recruitment of new staff. That implies, among other issues, that designated people are present during the meetings and that people be able to take. decisions, either based on their position or by delegation, because the process leading to authorisations can be long.
- The differences in structural models and collective agreements should be reviewed and where there are differences then explanations provided to employees (e.g. Pay levels are different for similar work.)
- Work place cultural issues or 'sense of belonging' activities should be blended or initiated if there are none.
- Local committees such as Wellness should be a joint initiative, to ensure consistent activities for all staff in a site.
- Site access guidelines should be as consistent as possible. How do both teams' over-time practices, working alone policies and 3rd party access policies impact each other?
- In terms of roles, staff should see direction within their own organization/hierarchy

OPERATIONS (SERVICE STANDARDS, HOURS OF OPERATION, OFFICIAL LANGUAGE REQUIREMENTS, PARKING, ETC.)

- Operations, especially the local managers from both sides, should be in constant communication around all aspects of the co-located site e.g. shared spaces, protocols for office operations, etc.
- Managers and supervisors should strive for common hours or otherwise be prepared for client complaints.
- Different office closure standards will likely cause employee tension; for example, one group gets the day off for a snowstorm and the other doesn't get the same thing for observed Holidays.
- Office closure policies for both groups should be as consistent as possible. Will decisions to close the office be made jointly or will someone be assigned to make the decision for the site? Or will one service be closed while the other is open?
- Differences in Observed Holidays will have to be managed
- Common hours of operation. Different office hours cause employee tension; for example, when one group finishes at 4:00 and the other doesn't finish until later
- Triaging of clients e.g. greeter
- Joint approaches to health and safety, such as joint Business Continuity Plans can assist in ensuring an integrated working environment for employees.

Best Practices

PERFORMANCE MEASUREMENT AND EVALUATION

- Add content provided today on co-location here vs under the measurement chapter

SECURITY (PERSONNEL, SITE, ASSETS, ETC.)

- When signing the agreement, make sure there are indications about the mechanism to maintain safety and security for the premises and the personnel.
- Some examples are the utilization of cameras, the recruitment of responsible personnel for security, the usage of magnetic or non-magnetic access cards, to name a few.
- Shared space often means employees from both groups will have easy access to each other's work areas and spaces. However, there would be added security for rural locations with small numbers of staff, and working alone scenarios could be reduced.
- Privacy and protection of information practices should be streamlined to avoid security incidents and to avoid putting client information at risk. Note that each partners standards, practices and guidelines may not be the same
- Well defined operational and administrative roles and responsibilities can optimize staffing and operations (i.e. having one welcome point for both organizations).
- Creating a collaborative service experience through joint signage and harmonized hours of service provides an integrated service experience

SERVICES PROVIDED

- Is parking administered by landlord or tenant? Is there a parking fee or is parking free? Is parking assigned to each service separately or is the parking area freely available to any client using the location?
- Is there enough parking for both groups of employees? Is it consistently administered; for example, does one group have to pay for parking while the other parks for free?
- If one group accepts limited payment options compared to the other, they will likely have to address an increased number of client concerns (i.e. "they accept cash? Why don't you?).

CO-LOCATION

Tools & Resources

- Feasibility study template
- Cost-sharing model
- Security plan/ security by design guidelines
- Communications plan template
- Human resources plan template
- MoUs, Service Agreement Template : example from SC –ATL | MoU from SC and ServiceOntario
- Service Level Guidelines
- Collaborative Service Experience Framework example from SC Ontario Region + ServiceOntario
- Framework for Engagement example from SC-Ontario Region + ServiceOntario
- Greeter Book example from Ottawa City Hall (Service Ontario)
- Letter of Intent example from Service Ontario

"Co-location helps both organizations maintain a viable in-person network and to learn from each other's experience.."
a civil Servant from Service Ontario

EXAMPLE OF SHARED SPACE AND SEPARATE COUNTER: THREE LEVELS OF GOVERNMENT AT OTTAWA CITY HALL

DESCRIPTION

Started in 2006, the three stakeholders renewed their Service Agreement in 2015. Service Canada was the third to get on board they started with 2 spots (wickets).

OBJECTIVES

STATUS, RESULTS, NEXT STEPS

At the entrance to City Hall there is an information desk funded by the three levels of Government, plus a touch screen system with a directory of the area. This is supposed to provide help for a preliminary triage. In addition there is a digital self-service station for the three levels, but the systems are not integrated. For the lunch room Service Canada and Service Ontario are sharing the space and staff from the City of Ottawa are on their own.

PICTON: EXAMPLE OF SHARED SPACE

DESCRIPTION

In June 2016, Service Ontario and the Service Canada Ontario Region recognized the opportunity to co-locate service in Picton to provide a one-stop shop for many of their government needs.

The defining aspect of the Picton design and implementation process was collaboration by design – every design aspect of the Picton service experience was developed through collaboration by both organizations, with employees working across jurisdictions and applying different approaches learned from each other.

OBJECTIVES

Based on Service Canada's and Service Ontario's Collaborative Service Experience Framework the following objectives were envisioned:

- Seamless Service Delivery; A seamless and harmonized in-person client service experience
- Inclusivity and Accessibility; Leadership in Inclusivity and Accessibility for Clients and Employees
- Design Concepts; Planning with clients and employees in mind
- Security by Design; Ensuring a safe and secure environment for clients and employees
- Collaborative Working Culture and Environment; Working together to provide a seamless experience for common clients
- Employee Engagement; Collaborating internally to create an optimal work environment
- Communications and Engagement – Internal and External; Collaborating and engaging

STATUS, RESULTS, NEXT STEPS

Both organizations learned a lot about the services that the other provided and were able to resolve client services needs at the first point of contact. Staff are committed to the co-location process and feel a sense of ownership in providing great customer service to clients. This co-location partnership demonstrates the effectiveness of collaborative service delivery and design and will serve as a model for exploring future co-location opportunities in the future.

Introduction to Partnership Models

INTEGRATED

INTEGRATED

Definition & Subtypes

WHAT IS INTEGRATED PARTNERSHIP?

WHY PARTICIPATE IN AN INTEGRATED PARTNERSHIP?

WHO IS THE TARGET CLIENTELE FOR AN INTEGRATED PARTNERSHIP?

WHERE IS AN INTEGRATED PARTNERSHIP MOST SUITABLE?

WHEN IS AN INTEGRATED PARTNERSHIP IDEAL?

There are three types of Integrated Partnerships

PARTIAL INTEGRATED AGENT

One government official provides services for more than one level of government.

DIGITAL INTEGRATION

One level of government provides digital services on behalf of another government.E.g. NB and Transport Canada. There could be more sophisticated levels of integration including one single web portal to provide services for two or more levels of government.

INTEGRATED PAYMENTS

One level of government accepts payments on behalf of another level to government.

INTEGRATED

Best Practices

UNDER DEVELOPMENT

INTEGRATED

Tools & Resources

UNDER DEVELOPMENT

Digital Integration: IRCC Electronic Portal to Monitor Newcomer Infectious Diseases

DESCRIPTION

The Migration Health Branch at IRCC needed to find a way to work with the provinces and territories to ensure that newcomers to Canada who have inactive/latent tuberculosis receive medical surveillance. An electronic IRCC P/T portal was implemented in 2016 to allow for the sharing of information on a client's immigrant medical exam with the provinces and territories.

OBJECTIVES

- Facilitate health information sharing of newcomers to Canada from the Provinces/Territories to the IRCC
- Provide tools to employees to more effectively manage the program
- Better define roles and responsibilities of the IRCC and Provinces/Territories

STATUS, RESULTS, NEXT STEPS

- A formal evaluation of the medical surveillance program conducted found the medical notification process has been successful in notifying Provinces and Territories of clients that require surveillance, and available program information indicates that a large proportion of clients are complying with the surveillance requirement.
- Through the use of the portal employees have more time to establish bilateral relationships with individual provinces and territories and the existence of the MOU means that roles and responsibilities are more clearly defined.
- In the future the partnership could expand to consider other infectious diseases for surveillance to enable proper care and treatment of newcomers to Canada with underlying medical conditions related to infectious disease infections.

INTEGRATED: DIGITAL – SERVICE NEW BRUNSWICK PLEASURE CRAFT LICENSES

DESCRIPTION

In 2006, Service New Brunswick (SNB) began processing "Pleasure Craft Licenses" for all of Canada on behalf of Transport Canada. The relationship expanded as SNB took on the role of developing, in partnership with Transport Canada, a new online registration application that is hosted on the Transport Canada website.

OBJECTIVE

- Providing online access for all Canadians to apply for Pleasure Craft Licenses

STATUS, RESULTS AND NEXT STEPS

Now most registrations are completed online. Discussions are currently underway to further expand this important relationship.

SERVICE DELIVERY PILOT WITH THE GOVERNMENT OF THE NORTHWEST TERRITORIES

DESCRIPTION

Currently Service Canada delivers scheduled outreach services in six locations in the Northwest Territories (NWT). Staff are scheduled to travel to these locations once a month, but consistent service delivery is difficult due to HR challenges and travel affected by adverse weather conditions. Service Canada's presence in the NWT includes 5 Service Canada Centres and 6 scheduled outreach sites (covering 11 of 33 communities and reaching 81% of the population).

Meanwhile, the GNWT delivers territorial government services daily through Single Window Service Centres in 21 locations, including those served by Service Canada's scheduled outreach. GNWT employees who live and work in these communities are already providing some information on Government of Canada programs and services.

On January 9, 2017, a 12-month service delivery pilot was launched to provide in-person services for Service Canada in the communities of Fort Providence, Fort Liard and Tuktoyaktuk through GNWTs Single Window Service Centres.

Under the arrangement, GNWT employees are providing the following services for Service Canada:

1. General information and referral services for federal government programs and services;
2. Accepting and assisting with completing applications for Apprenticeship Grants, the Canada Pension Plan, Employment Insurance, the Guaranteed Income Supplement, Old Age Security and the Wage Earner Protection Program;
3. Transferring complex or transactional requests to a Service Canada Citizen Service Officer (CSO); and
4. Assisting when Service Canada requires that clients provide additional information.

GNWT employees have been provided access to internal training material as well as general information and tracking tools to support service delivery. Service Canada's current scheduled outreach service has continued over the course of the pilot to provide ongoing support and assistance to GNWT employees, and to ensure the quality of service is comparable to Service Canada's standards.

OBJECTIVES

- Enhanced access to ESDC programs and services in select remote NWT communities;
- A quality of service that is comparable to that of Service Canada's in-person network;
- Cost effective delivery of programs and services; and
- A flexible and transferable delivery model.

STATUS, RESULTS, NEXT STEPS

- The pilot was assessed at the 6-month mark (Interim Assessment). Factors such as efficiency, cost effectiveness and quality of services were assessed. Findings from the Interim Assessment demonstrated a significant increase in access, high quality services, positive client feedback and delivery of services at a lower cost.
- A final assessment will be conducted at the pilots 12-month mark, following which; a decision will be made regarding the continuation, modification and/or expansion of the agreement.

NB Municipal Payments

DESCRIPTION	OBJECTIVE	STATUS, RESULTS AND NEXT STEPS

OAS - Integrated payment for low income seniors with 1 province and 2 territories

DESCRIPTION	OBJECTIVE	STATUS, RESULTS AND NEXT STEPS

Canada Business Network and BizPal Service

DESCRIPTION

Innovation, Science and Economic Development (ISED) delivers the Canada Business Network – a national website that provides information and advisory services to SMEs and entrepreneurs who are looking to start, manage and grow their business. In addition, ISED works in partnership with the Provinces and Territories to deliver the BizPal Service – which provides business permits and licenses through the National BizPal Office.

OBJECTIVE

Availability of information about government programs and services for people who want to start and grow their business

- Make it easier for SMEs and entrepreneurs to find the information they need to start and grow their business
- Saving the end user time and money by using the online services

STATUS, RESULTS AND NEXT STEPS

The Services for Business Branch has developed a variety of initiatives and technologies that lend themselves to partnerships to extend the reach and capacity of the Canada Business Network (CBN) and the BizPal partnership. For the online platforms (canadabusiness.ca and bizpal.ca) regular client feedback tools are used to ensure content and layout is user friendly.

Formal mechanisms have been established for managing partnerships, including agreements, committees, reporting structures etc, that ensure efficient and effective stewardship by the Canada Business Network and BizPal national offices. The CBN is guided by a performance measurement and evaluation strategy that clearly lays out the requirements on a quarterly basis. For BizPal, the performance measurement framework clearly lays out the logic model, key activities and indicators for measuring success, including a formula for calculating and validating time/cost savings.

MEASURING SUCCESS

MEASURING SUCCESS

Performance Measurement

The following outlines recommended performance measurement tools for a Co-Location project:

- Gather information based on employee feedback, including from employees performing the greeting. This approach allows the service centres to collect information on the waiting time of clients, on the main services they ask for and if they are directed towards the correct organization.
- Gather information regarding the number of services delivered to clients.
- The comment box is another tool used by many organizations but its effectiveness is questionable given that feedback tends to be either extremely positive or extremely negative. However, implementing a follow-up strategy with the clients performed by the team leader usually allows for more clarification and nuance.
- In terms of indicators, three are currently used by the service centers:
    - The waiting time of the clients in queue
    - The length of the interviews with the service agent (this indicator serves to evaluate if the agents are performing in accordance to their own standards or if there is a variation, positive or negative)
    - The quality assessment (This evaluation process is performed by agents who possess an operational expertise. In this case, a virtual evaluation is executed by an agent who is mandated to give feedback on the way the interview was conducted).

Reporting Internally and Externally

CONTENT TO COME

Evaluation of the Partnership

- Evaluation Framework Guide for Designated Citizen Service Innovation, Service Improvement and Project Pilots
- Evaluation Framework for Designated Citizen Service Innovation, Service Improvement and Project Pilots

ADDITIONAL CONTENT TO COME

HELPFUL CONTACTS

HELPFUL CONTACTS