

Executive Summary

Introduction:

The consulting team comprised of Jennifer Wilson and Anne Morrison wishes to congratulate the Vancouver Joint Operating Agreement Task Force (JOA) on undertaking this Partnership Agreement review. By using the “best practices” from other proven and successful partnership models as the basis, the JOA has a solid foundation for future work.

Through our field research, we find that all partnership model organizations are in the midst of revisiting their original Partnership Agreements. Indeed, there is a common need to adapt or recreate these Agreements so that they can be relevant for today’s realities, and therefore be truly “living documents”. This means that these agreements not only address today’s issues and opportunities, but also provide a guidepost for current and future directions.

Report Content

The report includes information derived from a literature review, consultants’ experience, interviews with 3 “model organizations” (Seattle, Calgary, and Regina), a focus group with twelve Vancouver Staff/Community Associations members, and numerous meetings and a formal interview with the JOA’s Task Force.

The section on societal trends and community trends is an invaluable resource and will help ground any strategic thinking and position strategies to be responsive to current and future factors.

The “best practices” section is a consolidation of all the research material and provides a comprehensive list of what activities need to occur to support the partners as well as elements that should be included in the revised Partnership Agreement. The research details are provided in the Appendices.

Best Practices Learnings at a Glance

The best practices research is presented under 3 headings. Each heading is described in more detail below:

1. Desired Outcomes (5): Are the results that are hoped for in a well-functioning partnership relationship. These desired results also reflect what the JOA Task Force and the Vancouver Focus Groups shared with the consultants about what was important for their partnership model to achieve. There are 5 desired outcomes:
 - 1) A great appreciation of each other’s contributions;
 - 2) The ability to work well together;
 - 3) An effective mechanism, that achieves what it sets out to achieve;
 - 4) An efficient mechanism, that makes the most out of available resources; and
 - 5) An approach that is responsive to community needs.

- 2) Critical success Factors (27): Are the key elements that have been proven necessary to support a well-functioning partnership relationship. These factors have been customized to reflect the issues and opportunities that were identified by both the JOA Task Force and the Vancouver Focus Group. They

have been stated to provide a set of indicators against which a partnership’s performance can be evaluated. From the research, the consulting team identified 27 success factors that fall within the 5 desired outcome areas.

- 3) Best Practices: Describe what elements need to be in place to foster a well-functioning partnership and how model organizations have integrated the critical success factors into their agreements or their operating practices. The details are contained in the body of the report.

The list of outcomes and the associated critical success factors is presented below.

Outcome	Critical Success Factors
Outcome #1: A great appreciation of each other’s contributions	1. That each partner appreciates what each person brings to the relationship.
Outcome #2: To Work Well Together	2. Clarity about rationale for the partnership - why it is important and what is its value for the partners and wider community. 3. Periodic evaluation of the partnership - to ensure that it reflects the way the partnership needs to function in order to be relevant to current needs. 4. Balanced Board Composition – to ensure there are motivated members with both a grass roots perspective and ability to see the bigger picture. 5. Collaborative planning – so that board members and staff jointly assess the present and future needs and preferred directions for their work 6. City staff and Association members have mutual regard for each other – foundational to positive working relationships. 7. Agreement has clarity around roles and responsibilities – clearly defined, mutually understood, roles and responsibilities provide a common framework for standards and accountability. 8. Clarity around staff allegiance – staff need to understand the broad public and community needs, as well as the local community needs that their Partnership is intended to address. 9. Agreement with clarity around expectations and indicators for success – staff and partners need to work within a common framework, have realistic expectations of what they can achieve, and an effective evaluation approach. 10. City staff and Assoc members effectively communicating with each other – clear communication between levels of staff and with all kinds of partners is essential to sustaining positive

working relationships and rapport.

Outcome #3: To be Effective – ie, achieving what set out to achieve

11. **Learn from the past**, recognize and celebrate accomplishments - both staff and partners appreciate recognition and acknowledgement of their individual efforts, as well as their accomplishments through partnership.
12. **Agreement** reflects how partners work together - specific guidance on the **roles and responsibilities** is needed as well as an understanding of how partners work together on a day to day basis
13. **Agreement** provides **clear guidance** – it needs to be revisited regularly to ensure relevancy and usefulness
14. **Coordination and support services to CAs** – CAs need to feel supported through a variety of ways, including communication systems, training, resources, and support.
15. **CA members are supported by the City** - staff and partners can work together to determine what are the common informational, support and training needs that the City can address.
16. **City is supported by the CAs** – CAs provide a huge volunteer base, resources, knowledge, skills, and advocacy to enable a wider reach into the community.
17. **Citizens well served** and there is equitable services between communities with different needs - it is important to have a mechanism to ensure equitable services for all citizens.
18. An approach to reach the have not communities in order to have **equitable services** - this requires processes to enable all CA's and staff to see the larger picture of who is not being served and how they can coordinate their resources to ensure a basic level of service for all.
19. Clear process for **handling revenue** – proper checks and balances/accountabilities
20. Clear process to **handle differences and conflicts** – guiding principles, codes of ethics, conflict of interest clarifications and other acceptable ways to develop mutual understandings and resolve differences

Outcome 4: Efficient – making the most out of available resources

21. Each party **accountable** for their **area of responsibility** - to enable realistic expectations and common standards
22. Monitor the **City's investment in CAs** – established service level standards provide assurance of good value

23. Be **accountable** to the **community** – today’s citizens want to know there is value through services
24. There are **tools and resources to support the partnership model** – a variety of resources are required to ensure mutually understood rules, protocols, and processes that support positive relationships and effective operations.
25. Services from partnerships are **responsive** to changing circumstances – ensure that services reflect changing demographics, trends, gaps in services and urgent priorities.
26. Board/Staff are truly **plugged into community needs** – meet more than the typical 20% of one’s local community’s needs.
27. **Respect lifecycle of CAs** – create a mechanism to support CAs which have accomplished their purpose and no longer viably address current needs. Such CAs need to be acknowledged and disband if necessary, to make room for another community response for the changed realities.

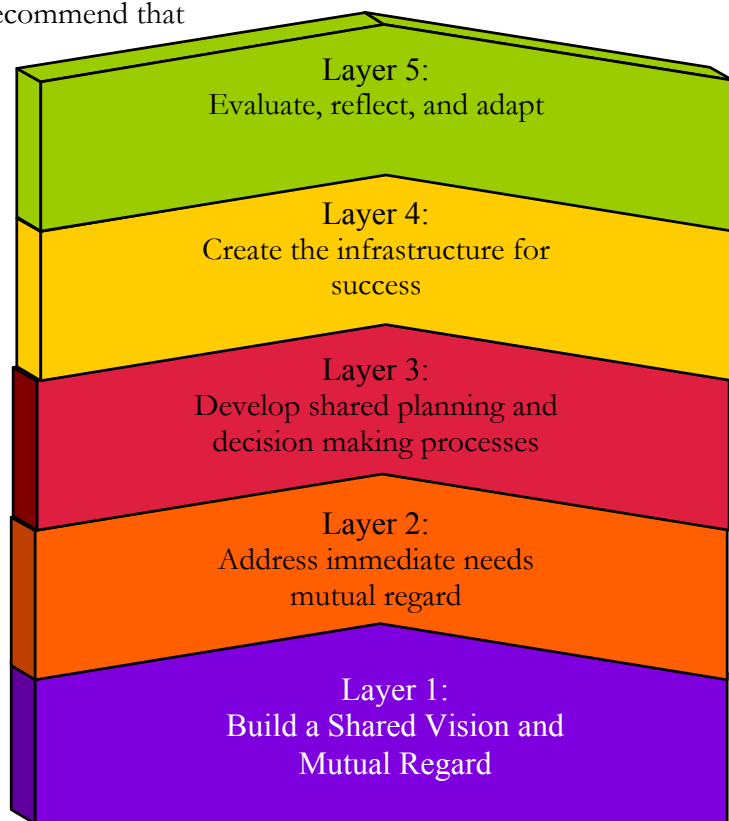
Outcome #5: Responsive to Community Needs

Prioritizing Your Focus

To move ahead in a strategic manner, we recommend that the JOA take a phased approach which addresses the priority areas in order of importance. The phases related to the following requirements:

- (1) Build a shared vision and mutual regard;
- (2) Address immediate needs;
- (3) Develop shared planning and decision making processes;
- (4) Create the infrastructure for success; and
- (5) Evaluate, reflect, and adapt

These 5 layers are depicted in Figure 1 in conjunction with the critical success factors associated with each.



Layer - Description	Critical Success Factor (Number precedes description and is consistent with the number in the body of the report)
<p>Layer 1: Build a Shared Vision and Mutual Regard Building a shared vision and developing mutual regard within and between partners will set a strong foundation for future collaborative and strategic thinking. It will enable productive discussions around important service delivery issues such as how to develop equitable resources for all citizens. This foundational work also provides a context for creating a revised partnership agreement. And it will facilitate positive ways to resolve differences and collaboratively address challenges. Such a solid base moves the Partnership Model ahead and provides ways for people to feel validated, respected and understood so that they can successfully strategize next steps together.</p>	<p>First Layer Success Strategies: 1 - Each partner’s appreciation for what each person brings to the relationship. 2 - Clear about rationale for the partnership. 6 - City staff and Association members have mutual regard for each other: 7 - Agreement has clarity around roles and responsibilities. 8 - Clarity around staff allegiance 10 - City staff and Assoc members effectively communicating with each other</p>
<p>Layer 2: Address immediate needs The second layer focuses on strategies which identify and address immediate needs for the key stakeholders (i.e., the staff, partners, and the wider community). It involves processes to identify and meet each stakeholders’ unique needs and to provide a sense of worth, comfort and mutual support to each. By meeting the respective needs and formalizing them, the stage is set for strategic thinking as well as for resolving the more complicated issues.</p>	<p>Second Layer Success Strategies: 14 – Coordination and support services to CA’s 15 – CA members are supported by the City () 16 - City is supported by the CA’s 20 – Clear process to handle differences and conflicts (commitment support to staff and CA’s in difficult time) 17 – Citizens well served; equitable services between communities with different needs (commitment to support to community) 9 - Agreement with clarity around expectations and indicators for success:</p>
<p>Layer 3: Develop shared planning and decision making processes The third layer addresses the need to instill a belief in collaboration and for creating processes and forums for shared planning and decision making.</p>	<p>Third Layer Success Strategies 5 – Collaborative planning</p>

<p>Layer 4: Build the infrastructure for success This layer includes the systems, processes, protocols, etc which are required to guide and track how the relationships work in order to keep the partnership working effectively and efficiently. Because the required relationships have been already built in trust and mutual respect, now the infrastructure can be created from these principles and reflect sustainable accomplishments.</p>	<p>Fourth Layer Success Strategies 25 - Services from partnerships are responsive to changing circumstances 26 - Board/Staff are truly plugged into community needs 18 – Reach the have not communities in order to have equitable services 19 - Clear process for handling revenue 21 - Each party accountable for their area of responsibility 24 (but be thinking and creating frameworks about it in the above steps – actual tools etc at this point) 27 - Respect lifecycle of CA’s 4 – Board Composition 12 – Agreement reflects how partners work together 13 – Agreement provides clear guidance, is a reference, and understood by each partner</p>
<p>Layer 5: Evaluate, Reflect and Adapt This layer is essential to ensure that the processes and mechanisms are relevant to the changing times and address new needs and priorities which surface as the partnerships evolve. It builds in the need to learn from the past. And, it reflects the need for flexibility i.e., to make changes as necessary. It will also shows the value that is provided through the partners’ investments and service delivery approach. When designed correctly, partners do not interpret change as a threat but rather as an opportunity to improve their response to community needs.</p>	<p>Fifth Layer Success Strategies: 11 - Learn from the past: recognize and celebrate accomplishments 3 - Periodic evaluation of the partnership 22 - Monitor the City’s investment in CA’s 23- Be accountable to the community</p>

Conclusion:

This research has enabled the Vancouver Joint Operating Task Force to 1) take a broader look at how the Partnership Agreement can be made responsive to current realities and 2) incorporate learnings from other successful models. Through this research and field consultations, links between Vancouver, Seattle, Regina and Calgary have been established. Consequently, there is the opportunity to continue to exchange knowledge so that each organization continues to benefit from each other’s learnings and ultimately better serve their communities.

Respectfully submitted,

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