

Building Connections: Linking Labour Supply and Demand in Support of Major Development Projects

A Case Study: North Island Employment Foundations Society

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April 7, 2016

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ACKNOWLEDGEMENTS

First I want to say thank you to the Professors and my fellow MACD colleagues. This program would not have been the same without the richness of conversation and experience you all shared.

Thank you to my Supervisor Dr. Emmanuel Brunet-Jailly for your patience and insights as I worked through the process of completing this research project.

I would also like to thank Doug Preston for planting the idea for this research, your passion, and for teaching me so much along my journey.

I have had the great pleasure working with Val Meaney, Executive Director of North Island Employment Foundations Society as my client for this research and I want to say thank you for being one of the most brilliant, talented and truly gifted leaders I have ever had the privilege of working with. Thank you for your support, encouragement and chocolate!

Finally, I could not have done this without the support, love and encouragement from my entire family. In particular, thank you to my husband Cliff and my son Finley for inspiring me every day to want to make the world a better place.

To my nephews Rylan, Bowen and Bridger and to my son Finley – we are very fortunate to live in a country in which we have access to good education and I never want you to take your education for granted. Learn, grow, explore, work hard, make good choices, be good global citizens and do amazing things with your smarts. I love all of you and am so very proud of where you are now and where I know you will go in the future. I have no doubt you will make the world a better place!

EXECUTIVE SUMMARY

In an increasingly complex global society a shift in local policy initiatives and choices has and continues to occur. As a result, no single entity (i.e. government, business, non-profit organization, citizen) can possibly have all of the answers to the issues impacting their community (Torjman & Makhoul, 2012, p. 5; Morse, 2010, p. 231). Given this context, and recognizing the need to make good decisions in a “contemporary economy” (Clarke & Gaile, 1998, p. 24) it brings to light the importance of partnership structures; systems and processes; and tools that community organizations may use to prepare for economic development opportunities and initiatives that may arise (Clarke & Gaile, 1998, p. 211; Cavaye, n.d., p.14).

With two major development projects occurring in the Campbell River region: the BC Hydro John Hart Generating Station Replacement project (JHGSRP) and the North Island Hospitals project (NIHP) worth a combined \$1.7 billion dollars before spin off benefits there is opportunity to connect the labour supply and demand needs of these projects and organizations such as the client North Island Employment Foundations Society (NIEFS) have a role to play.

The purpose of this research is to analyze and recommend smart practices for partnership structure; systems and processes; and tools that community Employment Service Centres like NIEFS can consider implementing in their work to connect the labour supply and demand needs of major development projects occurring in their region.

The findings from this research followed an extensive review of literature from the UK, Canada, USA and Australia. Information was gathered from published academic literature, journal articles and books along with information collected from publically available organizational websites, documents and case studies, and data and reports available from reputable Internet sources and University of Victoria library databases.

The literature review and meetings with the client helped build a research plan that consisted of four face-to-face semi-structured interviews. The interview questions consisted of 15 open-ended questions broken into three sections: Partnerships; Systems and Processes; and Tools.

The interview findings in conjunction with the literature are analyzed and provide tangible recommendations for smart practices related to partnership structure; systems and processes; and tools for community based organizations to work together to support the linking of labour supply and demand during major development projects occurring in their region.

In reviewing the research findings in the context of the literature it becomes clear that there is no quick fix when it comes to smart partnership practices and it requires a tremendous amount of time, effort, patience and leadership to balance the complex nature of partnerships and the interrelated, moving pieces that impact the outcome (Huxham & Vangen, 2005, p. 12).

Ultimately, given the dynamic nature and the many “leverage points” (Meadows, 1999, p. 1) within a partnership system, what works for one partnership may not work for another nor should it be assumed that a specific example of a successful partnership could be identically replicated with other partners.

Regardless, the recommendations offered provide a starting point for any community and/or organization to begin exploring what works for them in connecting labour supply and demand in support of major development projects occurring in their region.

- **Recommendation 1:** Develop both Formal and Informal Partnerships
- **Recommendation 2:** Initiate Contact Early with Major Project Leaders
- **Recommendation 3:** Ensure Committed Leadership
- **Recommendation 4:** Systems, Processes and Tools - Identify and agree upon systems, processes and tools that will be used throughout the partnership.

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1. INTRODUCTION

1.1. Overview

“If cities are anything, they are entities that continually change, mutate, or adapt (Savitch & Kantor, 2002, p. 53).”

Throughout history communities have held varied levels of responsibility and used different strategies and bargaining tactics to support local economic development to ensure the overall health and sustainability of their community (Clarke & Gaile, 1998, p. 58; Savitch & Kantor, 2002 p. 215). A shift in local policy initiatives and choices has and continues to occur from what Clarke and Gaile (1998) refer to as first, second, third and fourth wave approaches described below (p. 56).

Waves of Policy Initiatives			
First Wave	1960's and prior	Locational Strategies	<ul style="list-style-type: none"> Location based competition and business attraction through reduced costs of production
Second Wave	Mid-1970's – 1980's	Transitional entrepreneurial strategies	<ul style="list-style-type: none"> Based on leveraging public funds to address market issues such as unemployment and low wages in hopes of market expansion
Third Wave	Late 1980's through 1990's	Postfederal entrepreneurial strategies	<ul style="list-style-type: none"> Initiatives are included in a range of policy tools and strategies driven locally (i.e. business incubator)
Fourth Wave	Mid to late 1990's and beyond	Globalization and human capital	<ul style="list-style-type: none"> Integrating local economy into global markets; building human capital; increased use of technology

(Clarke & Gaile, 1998, p. 56)

As communities have moved through these waves of policy initiatives over the years Savitch & Kantor (2002) argue decisions are made depending on the combination of “bargaining resources” (p. 349) which are unique to a particular city and where they fall along the social centered policy to market centered policy spectrum (p. 142).

Today's cities and communities are part of a complex global economy which Clarke and Gaile (1998) refer to as the “contemporary economy” (p. 24) in which they identify three key factors that impact economic development decisions and strategies at the local level:

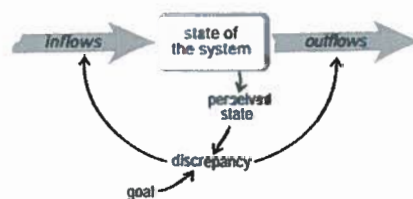
1. The shift from high-volume to high value-added production processes;
2. The integral role of human capital in the changing nature of international economic competition;
3. The hollowing-out processes underlying the new localism and the new geography of human capital (p. 24).

In essence, as we move away from an era of decision making based on “smokestack chasing” (Clarke & Gaile, 1998, p. 20; Boothroyd & Davis, 1993, p. 231) or a competitive location focused advantage with cost effective production and physical capital assets (i.e. a city limits model) (Clarke & Gaile, 1998, p. 182) to a global knowledge-based economy in which cities and communities will be impacted more by human capital assets (Clarke & Gaile, 1998, p. 198) this large scale global shift will have impacts at the community level and how decisions are made.

As a result, no single entity (i.e. government, business, non-profit organization, citizen) can possibly have all of the answers to the issues impacting their community (Torjman & Makhoul, 2012, p. 5; Morse, 2010, p. 231). Given this context, and recognizing the need to make good decisions in a “contemporary economy” (Clarke & Gaile, 1998, p. 24) it brings to light the importance of partnership structures; systems and processes; and tools that community organizations may use to prepare for economic development opportunities and initiatives that may arise (Clarke & Gaile, 1998, p. 211; Cavaye, n.d., p.14).

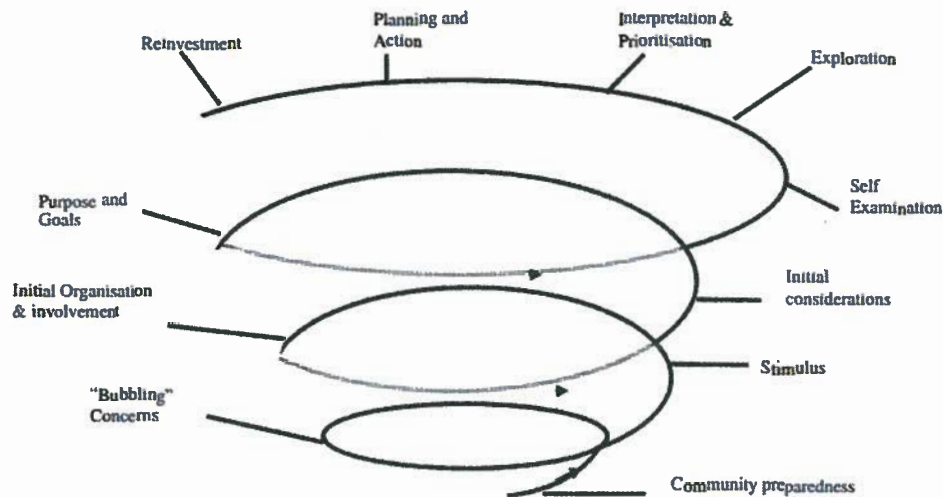
Further, the literature provides many examples of partnership structures; systems and processes; and tools for assisting communities and organizations to work together and some are successful and others are not (Mattessich et. al., 2001, p. 22; Austin, 2012, p. 734; Becarra et. al., 2008, p. 691; Eberts & Erickcek, 2002, p. 36; Victorian Council of Social Services [VCOSS] n.d.a, p. 3; Kohm, 1998, p. 38; Parkinson, 2006, p. 16; Collaboration Round Table, 2001, p. 10). Identifying and responding to community issues while continually faced with funding constraints; competing agendas; specific mandates and missions; and the time and financial commitment it takes to work together is hard work for all parties involved.

Throughout this report reference to systems and processes is a theme. To ensure consistency in understanding and applying the research findings it is important to understand both. For the purpose of this research systems can be explained by the following diagram:



(Meadows, 1999, p.4)

Further, process related to community development can be explained by the following diagram:



(Cavaye, n.d., p. 8)

Ultimately, in an increasingly complex global society innovation in all we do especially at a community level is important and we must be willing to try new partnership and collaborative methods in order to compete; sustain a healthy community; and provide different opportunities for different members of the community to be part of economic development initiatives (Clarke & Gaile, 1998, p. 114). If we don't, "We are going to be surprised by black swans. We are going to be surprised by unknown unknowns" (Ho, 2012, para. 2). Learning from and sharing what is learned about partnership structures; processes and systems; and tools is the aim of this research so the unknown becomes somewhat familiar.

1.2. Recent History – Campbell River

"A community's collective standard of living depends on the health of the local economy (Clarke & Gaile, 1998, p. 20)."

Communities are interconnected systems and at a time when many are faced with global change and transformation, response can be varied and dependent on complex factors that are economic, demographic, technological, environmental and political in nature ultimately impacting the "social order" (Savitch & Kantor, 2002, p. 3) of a community and its citizens. Located on North Vancouver Island, Campbell River is a small community of 36,096 residents that has seen its share of economic change and transition over the past seven years (Statistics Canada, 2012).

With the 2008 global recession came the permanent closure of the TimberWest sawmill in 2008 seeing 257 people lose their jobs permanently followed by the closure of Catalyst's Elk Falls pulp mill in 2010 leaving well over 1000 displaced forestry workers out of work (North Island Employment Foundations Society [NIEFS], 2010, p. 5). In addition, March 2008 saw Breakwater Resources announce restructuring at Myra Falls mine reducing the workforce by 187 with further layoffs totaling 240 people seven months later (NIEFS, 2010, p. 5).

Consequently, sobering statistics during that time regarding employment insurance (EI) and income assistance (IA) use were undeniable. Statistics Canada reported that between April 2008 and April 2009 EI beneficiaries in Campbell River tripled (Statistics Canada, 2009, para. 23) and in September 2009 IA beneficiaries over the age of 19 represented 3.3% of the Campbell River population far greater than the 1.7% provincial percentage (BC Statistics, 2012, p. 3).

As a result the City was forced to acknowledge that although the resource sector continues to be an important economic driver, diversification is essential for Campbell River's survival. Actively transitioning from being primarily dependent on a good-producing resource-based economy driven by forestry, fishing, mining and construction towards economic diversification to support and grow new opportunities and sectors is new territory for Campbell River and requires different strategies than the past (Jochen, Bazowski, & Clark, 2011, p. 5; Randall & Ironside, 1996, p. 22).

Considered a 'Mill Town' and being economically stable for over 60 years the overriding community attitude until recently has been that of status quo. As a result, issues and projects related to economic diversification especially those focused on major projects were not a priority focus for residents, businesses or government.

When we consider the extent to which the 2008 global economic recession has impacted resource dependent communities such as Campbell River, it is evident that economic diversification is essential. Recovery expects to open opportunities related to: revitalization of the forest and resource sectors; new clean energy projects; growth in recreation, tourism and arts and culture; aboriginal economic development; and growth in creative, knowledge-based industries.

However, with an aging population; increased out-migration of youth; and competition for skilled labour from other industries and regions skills shortages, skill mismatches and a reduced labour pool will become reality. As a result, a shift towards collaborative partnerships between community organizations was deemed essential for building local capacity and connecting the labour supply and demand needs of major development projects occurring in the region.

North Island Employment Foundations Society (NIEFS) is the primary Employment Services Centre for Campbell River and the North Island and has a mandate of connecting labour supply and demand to employment opportunities in the area. With 30 years in business and as one of very few organizations in the area

with the capacity (human and financial) and associated mission to act in a coordinating role in the community, NIEFS is well positioned to lead and support a review of smart practices related to partnership structures; systems and process; and tools that support the linking of labour supply and demand to major development projects occurring in their region.

Why is this research important?

As communities entertain the constant push and pull between private and public sectors in an increasingly global world, it is recognized that context matters and there is no “silver bullet” (Clarke & Gaile, 1998, p. 89) when it comes to ensuring a healthy local economy.

As Provincial and Federal governments continue to devolve policy and decision making responsibilities to the community level local responses to competing in a global economy are considered the “new arenas for reconstructing globalization and reinventing citizenship” (Clarke & Gaile, 1998, p. 214). This research is important because it adds to the body of knowledge reflecting the vastly different partnership structures; systems and processes; and tools that communities and local organizations may use to respond to major development projects occurring in their region.

1.3. Client’s Rationale for the Research

Currently, the Campbell River region is in the midst of two major projects: the BC Hydro John Hart Generating Station Replacement project (JHGSRP) and the North Island Hospitals project (NIHP). Combined these projects are worth approximately \$1.7 billion dollars. When you factor in the economic spinoffs (hotels, grocery stores, entertainment, restaurants etc.) and the hundreds of people needed to work on these projects NIEFS wants to identify smart practices for partnership structure; systems and processes; and tools to effectively connect the labour supply and demand needs of these projects.

1.4. Research Question and Objectives

The Research Question: What smart partnership practices (i.e. partnership structure; systems and processes; and tools) can Employment Service Centres implement to connect labour supply and demand with major development projects occurring in their region.

The objective of this research is to analyze and recommend smart practices for partnership structure; systems and processes; and tools that community Employment Service Centres can consider implementing in their work to connect the supply and demand needs of major development projects occurring in their region.

1.5. Key Deliverables

With a history of strong partnerships developed across the North Island, NIEFS identified a research opportunity to document their process and better understand the benefits and challenges faced when partnering and an opportunity to learn smart practices identified by the literature.

This research report will provide NIEFS with a qualitative case study documenting the partnership structures; systems and processes; and tools NIEFS and other community organizations used to connect labour supply and demand to the JHGSRP and NIHP occurring in the region.

Finally, this research provides recommendations for future partnership opportunities and considerations for potential replicability in other communities faced with similar situations that NIEFS may work with in the future.

1.6. Brief Discussion of Client

NIEFS is a charitable community-based not-for-profit organization and the major employment agency for Northern Vancouver Island. As a leader in workforce development NIEFS provides services to over 5000 job seekers and 500 companies annually. As an organization, NIEFS has been actively connecting employers with workers since 1986.

With 30 years in business, NIEFS is a cornerstone in North Island communities building extensive partnerships with businesses, industry, other organizations, communities and individuals in Campbell River and across the North Island. These partnerships are integral to the organization's ability to assist people to build self-sufficiency through active and sustainable participation in the labour market and assist employers to hire the right people, with the right skills at the right time contributing to a strong, resilient and healthy community.

NIEFS has worked hard to identify and track local labour market information through tools such as the job board database that helps show supply and demand side labour market characteristics at a community level.

Local labour market information is a critical resource for key community stakeholders and is used by job seekers, employers, industry, training organizations and educators to respond to changing economic and labour market conditions and trends.

NIEFS is keen to better understand partnership structures; systems and processes; and tools as it relates to the work they do. The research findings are a valuable tool to assist the organization to better formulate partnership plans and to tangibly demonstrate in future contract request for proposals their experience and findings when it comes to

partnership development that supports their mission “to assist those in need with the development of skills that will enable them to find and hold employment in an ever-changing world” (NIEFS, 2014, p. 1).

1.7. Researcher’s Relationship to the Client

As the researcher on this project I recognize the importance of transparency. As such, I am disclosing that I also work at NIEFS on a daily basis as the Regional Manager, Community and Labour Market Services and have been employed by the organization since June 2009.

Reporting to the Executive Director I am very familiar with the organizational leaders, community partners and services. Due to my experience working with those interviewed for this project, I bring certain biases to this case study. I have made every attempt to ensure objectivity. With that being said, it is important to note that my biases do impact how I collect, understand, and interpret the data collected and provide recommendations.

1.8. Organization of this Report

Research included a literature review of the various definitions, models, tools and systems related to collaboration and partnership-building among community organizations and existing research and case studies on how major development projects impact communities and organizations.

The organization of this research report is broken down into the following sections:

Section 1 – Introduction

Section 2 – Client Background

Section 3 – Methodology

Section 4 – Literature Review

Section 5 – Findings

Section 6 – Discussion

Finally, the report finishes with recommendations and conclusion in Section 7 and 8 respectively.

Throughout the sections of this report and more specifically in the literature review in Section 4 it is suggested that although the literature indicates that building strong, collaborative partnerships and individual and organizational capacity are increasingly seen

as essential for building healthy communities (Boydell, 2007, p. 6; BC Healthy Communities, 2015; Parkinson, 2006, p. 16; Mattessich & Rausch, 2013, p. 4) there are also clear benefits (VCOSS, n.d.a, p. 3; Collaboration Round Table, 2001, p. 10) and challenges associated with partnership development (Parkinson, 2006, p. 10; Collaboration Round Table, 2001, p.8; Huxham & Vangen, 2004, p. 191; VCOSS, n.d.a, p. 3) which this research addresses.

The themes that emerged during the literature review helped shape the research process and methodology outlined in Section 3. In brief, after reviewing the literature and in further conversation with the client 15 interview questions broken into three categories: partnerships; systems and processes; and tools were developed. These open-ended interview questions were then incorporated into four semi-structured interviews that were audio recorded, transcribed and analyzed in the findings in Section 5.

The interview findings in conjunction with the literature were analyzed to provide tangible recommendations for smart practices related to partnership structure; systems and processes; and tools for community based organizations to work together to support the linking of labour supply and demand during major development projects occurring in their region. These findings are revealed in Section 5 along with further discussion in Section 6. The next section provides an organizational background for NIEFS and current context that influence and support the research.

2. CLIENT BACKGROUND

2.1. Mission

Established in 1986, NIEFS mission is to “assist those in need with the development of skills that will enable them to find and hold employment in an ever-changing world” (NIEFS, 2014, p. i). In so doing, NIEFS is guided by the following purposes, objectives, beliefs and core values:

NIEFS Purposes	NIEFS Objectives	NIEFS Beliefs and Core Values
<p>To act as a community resource for the gathering and sharing of information that will contribute to the skill and development of those in need.</p> <p>To develop and sponsor employment training opportunities, programs, and services for people experiencing difficulty finding and holding employment.</p> <p>To identify and acquire the necessary resources to fulfill the society's mission.</p> <p>To promote lifelong learning and the creation of learning cultures in both non-profit and for profit organizations and businesses.</p>	<p>To assist people with their transitions into the emerging labour market.</p> <p>To shorten periods of dislocation and to increase workers' attachment to the labour force.</p> <p>To develop solutions to unemployment that are community-based and build upon existing resources.</p> <p>To develop solutions to unemployment that reflect the changing nature of employment and the reorganization of work.</p> <p>To develop partnerships and networks of support that will assist the unemployed to become employed.</p>	<ol style="list-style-type: none">1. We believe in people-centered development because this is a sustainable process based on integrity, trust, empowerment, honesty, justice, equity and joy.2. We believe in working collectively and collaboratively because of the interdependence of our work and our communities.3. We believe that all members of our organization are committed to providing leadership in creating opportunities for people to experience learning, growth and development.4. We will be at the forefront of learning that develops the talent and potential of people.

(NIEFS, 2014, p. i)

2.2. Programs and Services

Funded by the Government of Canada and the Province of British Columbia to deliver the Employment Program of British Columbia (EPBC), NIEFS provides a range of employment services for eligible clients (i.e. workshops, targeted programs, employment advising, training, wage subsidy etc.) to residents of Campbell River to Port Hardy and many smaller communities in between.

NIEFS successfully delivers services to thousands of clients annually across the North Island through two storefront locations in Campbell River and Port Hardy that consist of approximately 45 staff. Additionally, NIEFS delivers services to smaller rural and remote communities on the North Island through telephone, online resources and satellite offices with community partners.

Although delivering the EPBC represents about 99% of organizational funding, NIEFS also has a history of delivering programs through other funded contracts such as: Skills Development Employment Benefit; Skills Connect for Immigrants; Skills Link for Youth; and Targeted Skills Shortage Program for low-skilled workers among others. Further, NIEFS is

also a registered charity and is able to deliver programs and services to those who do not meet eligibility requirements for existing programs and services.

2.3. Structure

NIEFS governance structure is most consistent with a traditional policy governance model whereby strategic planning, support and direction of the organization is the responsibility of the Board of Directors. Management and day-to-day operational decisions are delegated to the Executive Director for implementation (NIEFS, 2014, p. 1). The Executive Director manages the contract for delivering the EPBC through programs and services, prepares financial reports and makes recommendations to the Board.

Section 2.1 – 2.3 provide a solid overview of NIEFS as an organization. The more detailed account provides support for the position that with 30 years in business and having the human and financial capacity that supports their coordinating role in the community, NIEFS is well positioned to lead and support a review of smart practices related to partnership structures; systems and process; and tools that support the linking of labour supply and demand to major development projects occurring in their region.

2.4. Role in the Community

As a community in transition, the role of the citizens of Campbell River and municipal government when it comes to supporting major development projects occurring in the region has changed over the years. Shifting from little citizen involvement and high municipal involvement for first and second wave strategies primarily focused on physical capital related to retaining a small number of heavy industry (i.e. Catalyst Mill and TimberWest) employers to recognizing third and fourth wave strategies involving citizen participation and municipal consultation in supporting major projects such as the JHGSRP, NIHP and downtown revitalization policies (Clarke & Gaile, 1998, p. 56 & 72).

The challenge going forward is that although municipal government, educational institutions, and community organizations have demonstrated good (but not coordinated) leadership in creating an environment in which the entire community benefits (i.e. employment; goods and services; training etc.) over the duration of the JHGSRP and NIHP, these large projects are finite and the question becomes, “what happens when these projects are complete and those well-paying direct and indirect jobs are no longer available?” There is much debate in the community as to whether it has adequately capitalized on these projects in terms of economic development, expanding human capital and where that responsibility ultimately lies (Clarke & Gaile, 1998, p. 181).

NIEFS is committed to workforce development supporting “greater attention to the integration of human capital and economic development concerns and to the trade links and information infrastructure necessary to link local economies with the global web

(Clarke & Gaile, 1998, p. 182)” and understands this is of paramount importance in the community. Doing so requires a collective effort.

As a community leader in establishing and supporting collaborative partnerships, NIEFS takes an active role in coordinating workforce development in the region. Given the funding mandate to support the functioning of the local labour market both from a supply and demand perspective NIEFS is often at the forefront as a coordinating body linking community leaders, initiatives and resources that support this mandate. Examples of this include formal Memorandums of Understanding with organizations such as the Campbell River and District Chamber of Commerce (CRDCC); North Island Immigrant Welcome Centre; North Island College; Mount Waddington Regional District Economic Development Commission; and School District #85.

Initiatives such as the Campbell River Community Accord in Support of Workforce Development (Appendix 1); Workforce Development within a Rural Transitioning Economy Labour Market Partnership with CRDCC; Quarterly Labour Market Reports; Grade 13 School to Work Transition project with School District #72 supporting students with a disability to transition from school to work; community information sessions and industry and employer panels connecting job seekers to Major Projects and vice versa speaks to the leadership role based on collaborative partnership development NIEFS takes in the community.

Why is this background relevant?

Much like the changing landscape of communities through a shift in local policy initiatives referred to as first, second, third and fourth wave approaches (Clarke & Gaile, 1998, p. 56) NIEFS as an organization has successfully adapted and responded to the shifting landscape of federal and provincial employment services over the past 30 years through innovative practices.

Understanding NIEFS as an organization and how it fits within the context of a community in economic transition is important because it helps frame how and why decisions on partnership development are made. In an increasingly complex global society innovation in all we do is needed to ensure sustainable communities and organizations. A willingness to try new partnership and collaborative methods in order to compete; sustain a healthy community; and provide different opportunities for different members of the community to be part of economic development initiatives are part of a new reality (Clarke & Gaile, 1998, p. 114).

With this in mind the next section focuses on the research methodology for identifying smart practices (partnership structures; systems and processes; and tools) and the role they play for NIEFS in recognizing the need to make good decisions in a “contemporary economy” (Clarke & Gaile, 1998, p. 24).

3. METHODOLOGY

There is a plethora of literature and research pertaining to partnership development from many disciplines and from macro to micro perspectives. Prior to conducting research and devising a research plan, an extensive review of literature from the UK, Canada, USA and Australia was completed.

While there is much literature related to partnership development it is hoped this research will contribute to this growing body of knowledge through the lens of community economic development.

This research reviewed published academic literature, journal articles and books along with information collected from publically available organizational websites, documents and case studies, and data and reports available from reputable Internet sources and University of Victoria library databases.

In narrowing the focus of this research, a number of meetings with the client were held to explore what information they were seeking to learn from the research. The table below identifies what categories of information they wanted to garner from the research and the analysis of those categories.

Identified Research Areas		
Category	Analysis	Smart Practice
Partnership Structures	Explore types of partnership structures	<ul style="list-style-type: none"> - Explore the benefits and challenges of partnerships - Based on these what are considered smart practices in the literature
Systems & Processes	Explore how partnership structures operate through systems and process	<ul style="list-style-type: none"> - Explore the benefits and challenges of different systems and processes - Based on these what are considered smart practices in the literature
Tools	Explore tools available to assist in partnership development	<ul style="list-style-type: none"> - Explore the benefits and challenges of different tools - Based on these what are considered smart practices in the literature

To explore the identified research categories further required a comprehensive research plan to determine how this information would be collected. This research project is based on qualitative data analysis and incorporates a literature review and semi-structured interviews with open ended questions that were audio recorded and transcribed. It is from the categories presented above in conjunction with a review of the literature that

contributed to the formation of the interview questions. This section concludes with a review of methodological strengths, limitations and risks.

3.1. Secondary Data Collection

Secondary data collection is based on a literature review of academic and professional literature relevant to collaborative partnerships between community-based non-profit organizations. The literature review includes journal articles, books, organizational websites and documents and case studies that provide insight into the tools, systems and processes used by non-profit organizations in partnership development in the US, UK, Australia and Canada.

The purpose of the literature review is twofold. First, it provides background on the purpose, challenges, benefits, tools, systems and processes related to partnership development among non-profit organizations and identifies the differences from other types of partnership development such as for-profit and public sector partnerships. Second, the literature review helps identify success factors and smart practices in partnership development which help inform the open ended interview questions.

3.2. Primary Data Collection

Primary data collection began with an invitation to Senior Executives from NIEFS, CRDCC, JHGSRP and NIHP, all with extensive knowledge and experience working with NIEFS as they partnered to support the linking of labour supply and demand for both major projects.

Prior to conducting any interviews, all potential participants were provided with an invitation package which included: a project description and invitation to participate; a letter of information for implied consent; and a copy of the interview questions. All four invitations were accepted and face-to-face semi-structured interviews were conducted between May and July 2014. The interview questions consisted of 15 open-ended questions broken into three sections: Partnerships; Systems and Processes; and Tools. A summary of interview questions is available in Appendix 2.

3.3. Strengths, Limitations and Risks

Strengths

The primary strength of this research is the depth of detail collected from conducting open-ended interviews creating strong content for thematic analysis (Anderson, 2007, p. 1). To ensure accuracy in the "narrative account" (Creswell & Miller, 2000, p. 127) all interviews were audio recorded; transcribed and reviewed and confirmed by the participant. This process is known as member checking which aims to establish the

credibility of the information presented by the researcher (Creswell & Miller, 2000, p. 127).

Limitations

The primary limitation of this research project is the small sample size in which data was collected. Further, there are limits to confidentiality for the research participants due to the small selection of participants and due to the unique nature of the major projects discussed and who is involved. It is possible that people may be able to guess who made a particular comment despite the researcher's best attempt to maintain anonymity through the use of pseudonyms where necessary.

Risk

The subject of risk and potential harm to research participants for this project was deemed minimal as those involved did so within their professional capacity and therefore were not in any greater risk than that found within their daily work. This conforms to the Tri-Council Policy Statement (TCPS) definition of "minimal risk" (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, and Social Sciences and Humanities Research Council of Canada, 2010, p. 23). The University of Victoria's Human Research Ethics Board (HREB) granted this project full ethical approval on April 25, 2014.

4. LITERATURE REVIEW

When it comes to community development and the role partnerships play there are a range of views and schools of thought. The purpose of this literature review is to identify varying views and key themes related to the benefits and challenges of partnerships; partnership structure; systems and processes; and tools that could be considered smart practices in building successful partnerships in support of major development projects occurring in a region.

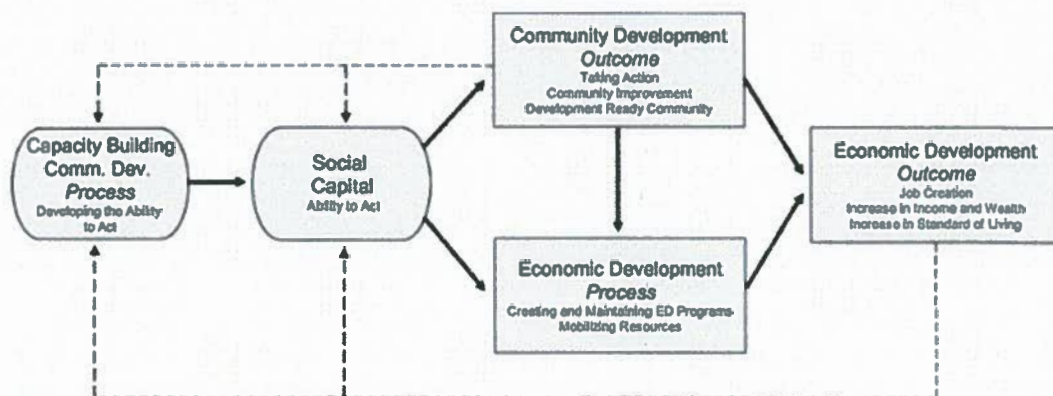
Further, this section reviews definitions and structures associated with partnership development; benefits and challenges; and factors and smart practices associated with successful partnership development which guides this report and the survey questions developed for primary data collection.

4.1. The Big Picture

To truly understand the benefits and challenges of partnership structures; systems and processes; and tools related to building partnerships at the micro level we must consider the larger macro context and different views in which partnerships exist and decisions are made.

When communities are faced with major development projects in their region there are a range of frameworks that can guide decision making to prepare and capitalize on these projects. Pittman et. al (2009) argue the importance of understanding the interrelatedness of community development and economic development and how associated processes and outcomes are connected as predictors of success (Figure 1).

Figure 1: Community and Economic Development Chain

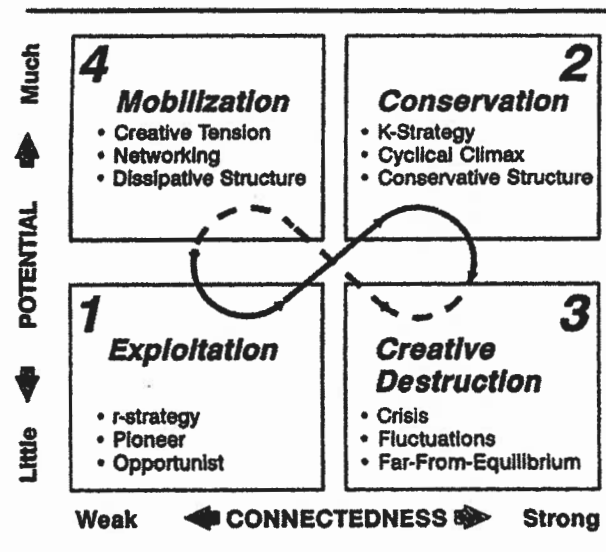


(Pittman et al., 2009, p. 82)

In Queensland, Australia, the government created a framework that moves away from prescriptive regulation to one in which the Department of State Development, Infrastructure and Planning works with partners such as industry, local government and other local stakeholders to better coordinate and manage projects. Clear roles and responsibilities provide state wide consistency in decision making reducing red tape and increasing liveability in the region (State of Queensland, 2013, p. 4). This speaks to Australia’s focus on regional development frameworks, leadership and decision making and recognizing development occurring in one region can have impacts on another region (Buultjens et. al., 2012, p. 183).

Conversely, Hurst and Zimmerman (1994) posit that smart community and partnership development practices are ultimately impacted by where in the ecocycle a community or organization begins from (Figure 2).

Figure 2: Community and Organizational Ecocycle



(Hurst & Zimmerman, 1994, p. 349)

Moreover, Boothroyd and Davis (1993) argue that there are three approaches to community economic development: growth promotion approach (cEd); structural change approach (ceD); and communalization approach (Ced) and decisions and outcomes will depend on the approach a community takes (Figure 3).

Figure 3: Comparison of three approaches to community economic development

	cEd	ceD	Ced
Concept of Economy	Monetary transactions	Monetary and nonmonetary transactions	Market and production distribution based on market and nonmarket principles
Concept of Community	Locality	Home	Mutual commitment
Primary Goal	Growth of jobs, income	Stability and sustainability	Sharing and caring
Primary Strategy	Increase monetary inflows	Increase local control through structural change	Integrate social and economic development

(Boothroyd & Davis, 1993, p. 237)

Regardless of the view or school of thought, as the world becomes increasingly connected the trend in devolving responsibility continues to shift from National to Provincial to municipal resulting in cities and communities taking a more active role in local economic development (Clarke & Gaile, 1998, p. 34; Barnes & Hayter, 1994, p. 292). The prevailing thought is that localities are in a better position to identify and respond to the needs of their communities (Eberts & Erickcek, 2002, p. 1; Phillips & Pittman, 2008, p. 12). Given that no city or community is the same it becomes evident that there are many paths in which local economic development can travel and what works for one community may not work for another (Clarke & Gaile, 1998, p. 89; Savitch & Kantor, 2002, p. 350).

Savitch and Kantor (2002) posit that the decisions and strategies implemented by any given city are a reflection of what they refer to as bargaining and identify six categories of bargaining (Figure 4) that impact the outcome of decisions and strategies for local development which include: bargaining context; regime or coalition type; resources employed; dominant partners; mode of public-private engagement; and development approach (p. 215).

Figure 4: Bargaining Categories

TABLE 6.1
Regimes/Coalitions and Bargaining

Bargaining Context	Regime or Coalition Type	Resources Employed	Dominant Partners	Mode of Public-Private Engagement	Development Approach
Dirigiste	Planner-Type 1 (Toronto and Paris)	Favorable economy, intergovernmental support, popular control, local culture	National or provincial governments, bureaucrats, public corporations	Open/sometimes negotiated. Led by state and public institutions.	Act prospectively to influence or control market forces.
Dirigiste	Planner-Type 2 (Milan)	Favorable economy, intergovernmental support. Ambivalent popular control.	National governments, political parties, bureaucrats, public corporations	Open, state-centered. Led by state and party leaders.	Stalemated, mired in disagreement. Reactive public management of the marketplace.
Entrepreneurial	Mercantile (New York)	Favorable economy, popular control. Ambivalent local culture	Business, government, occasional neighborhood and "good government" groups	Open-to-closed (institutional buffers to popular control). Led by public/private partnerships.	Market intervention is subject to cross-pressures. Overall, support for business by shaping marketplace.
Entrepreneurial	Free Enterprise (Houston)	Favorable economy	Business elites	Closed. Led by business.	Market-led, laissez-faire government.

(Savitch & Kandor, 2002, p. 215)

Further, Savitch and Kandor (2002) point to the importance of recognizing the impact of where along the social centered policy to market centered policy spectrum (Table 1) a city may fall as this also impacts the decision making process (p. 142).

Table 1: Social- and Market-centered Policies Spectrum

Social- and Market-centred Policies	
<i>Social-centered Policies</i>	<i>Market-centered Policies</i>
Economic Enhancement	
<ul style="list-style-type: none"> • High taxation on business and commerce • Restrictive zoning • Few or no business subsidies • Integrated, planned land use • Public-sector-led development • Social criteria in business promotion • Rail, metro, and other forms of mass transit • Planned job development retraining 	<ul style="list-style-type: none"> • Low taxation on business and commerce • Free land use • Extensive business subsidies • Discrete, market-driven land use • Private sector-led development • Commercial criteria in business promotion • Expressways and freeways for private automobiles • Open job development by consumer demand
Social Enhancement	
<ul style="list-style-type: none"> • Land-use exactions, linkage to public amenities • Public funding for land preservation • Strict architectural controls • Neighborhood emphasis • Publicly subsidized housing 	<ul style="list-style-type: none"> • Free, "no strings attached" development • Private rights for land development • Loose architectural controls • Downtown emphasis • Privately financed housing

(Savitch & Kandor, 2002, p. 103)

Moreover, Clarke & Gaile (1998) remind us that as policy initiatives continue to shift into a fourth wave a focus on connecting local to global economies; growing and expanding human capital; and an increased use of telecommunications will also impact decision making (p. 181). A key message being, cities and communities have choice in the decisions they make but we would be remiss to underestimate the complexity of decision making and choice in local development strategies (Phillips & Pittman, 2008, p. 12; Savitch & Kandor, 2002, p. 27).

At this point we have learned that there are many ways to think about how decisions are made at a local level as evidenced by Savitch & Kandor (2002) but there are also lessons to consider such as what works for one community may not work for another (Clarke & Gaile, 1998, p. 89; Savitch & Kandor, 2002, p. 350).

The next section of the literature review moves from the big picture context presented in 4.1 to a focus on key areas of partnership including: defining and deciding to partner; partnerships structures; benefits and challenges; and will finish with key factors and smart practices for successful partnerships consistent throughout the literature.

This is an important next step in the process as it helps shape recommendations that support NIEFS goal to better understand smart practices for partnership structure; systems and processes; and tools that community Employment Service Centres can consider implementing in their work to connect the supply and demand needs of major development projects occurring in their region.

4.2. Defining and Deciding to Partner

There are numerous definitions of partnership and collaboration throughout the literature along with much academic debate on what constitutes a partnership and whether there is value for those involved (Austin, 2012, p.728).

For example, Mattessich and Monsey (2001) define collaboration as:

“Collaboration is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. The relationship includes a commitment to mutual relationships and goals; a jointly developed structure and shared responsibility; mutual authority and accountability for success; and sharing of resources and rewards (p. 22).”

Victorian Counsel of Social Services (n.d.) defines partnership in the Partnership Guide as:

“Two or more organisations that make a commitment to work together on something that concerns both, to develop a shared sense of purpose and agenda, and to generate joint action towards agreed targets (p. 1).”

There is a consistent perspective among definitions that the foundation for a successful partnership is dependent on two or more organizations working together towards an agreed upon purpose and agenda who are committed to sharing resources, risks and rewards in hopes of achieving “mutually beneficial results” (World Economic Forum, 2005, p. 11).

Regardless of definition, the literature would argue that a valued partnership whether short-term, long-term, project-based, socially/economically or financially motivated has the ability to positively impact organizational capacity, service delivery, and the social and economic health of a community and its citizens (Austin, 2012, p. 734).

Partnerships are not easy. They require a tremendous amount of time, resources and commitment from those involved. Parkinson (2006) argues that a clearly defined vision and purpose; a firm commitment; necessary time; a welcoming organizational culture; and adequate funding must be in place before moving forward with a partnership (p.5). Further, consideration needs to be given to the amount of trust each partner organization has for one another and the partnership (Becarra et. al., 2008, p. 691; Eberts & Erickcek, 2002, p. 36; VCOSS, n.d.a, p. 3; Kohm, 1998, p. 38).

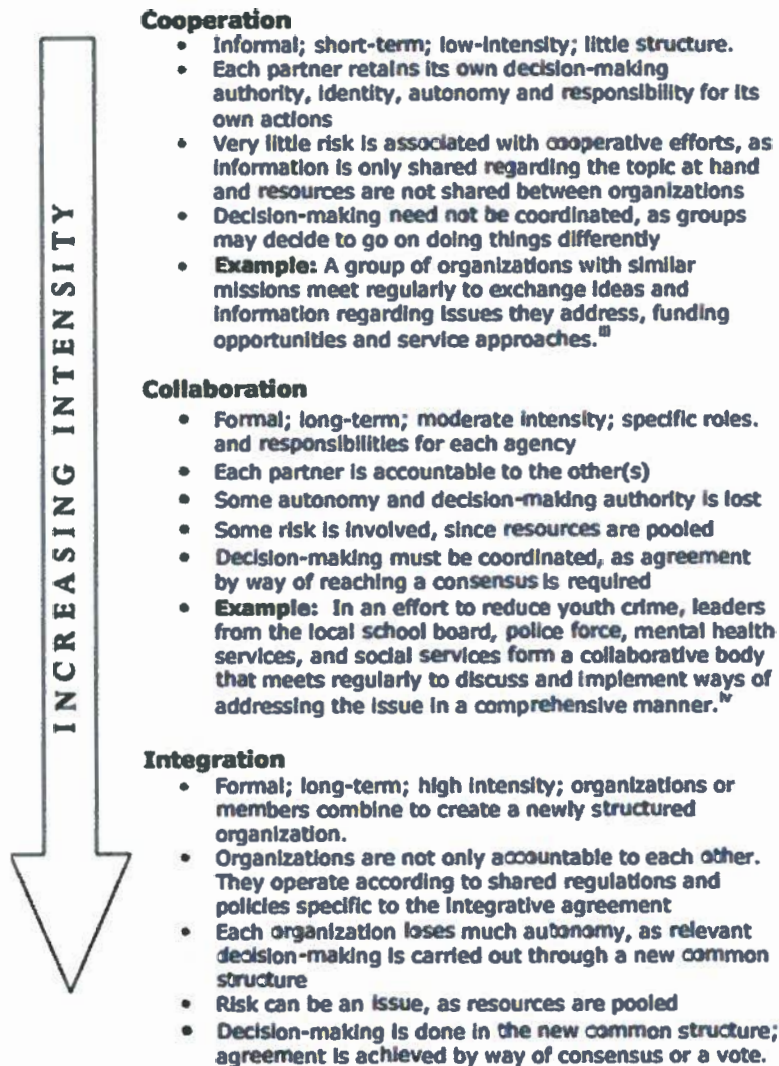
Once an organization, group, network or partner organizations can agree upon a working definition of partnership and agree there is value and they are prepared they can then move forward into a partnership and begin identifying what structure, benefits, and challenges that may arise throughout the life of the partnership. The next section delves into what it means to establish a partnership structure and the different ways this can be done.

4.3. Partnership Structures

There is no right or wrong when it comes to establishing a partnership structure. Partnership structures range from informal to formal and take into account many complex factors. Given the dynamic nature and the many “leverage points” (Meadows, 1999, p. 1) within a partnership system, what works for one partnership may not work for another nor should it be assumed that a specific example of a successful partnership could be identically replicated with other partners.

Parkinson (2006) argues that partnerships fall along a continuum or spectrum when it comes to formality, intensity and commitment (Figure 5).

Figure 5: The Partnership Spectrum



(Parkinson, 2006, p.4)

Further, Austin (2000) argues that the nature of a relationship can be categorized into four stages: philanthropic; transactional; integrative; and transformational depending on a range of factors that impact the nature of the relationship (Table 2).

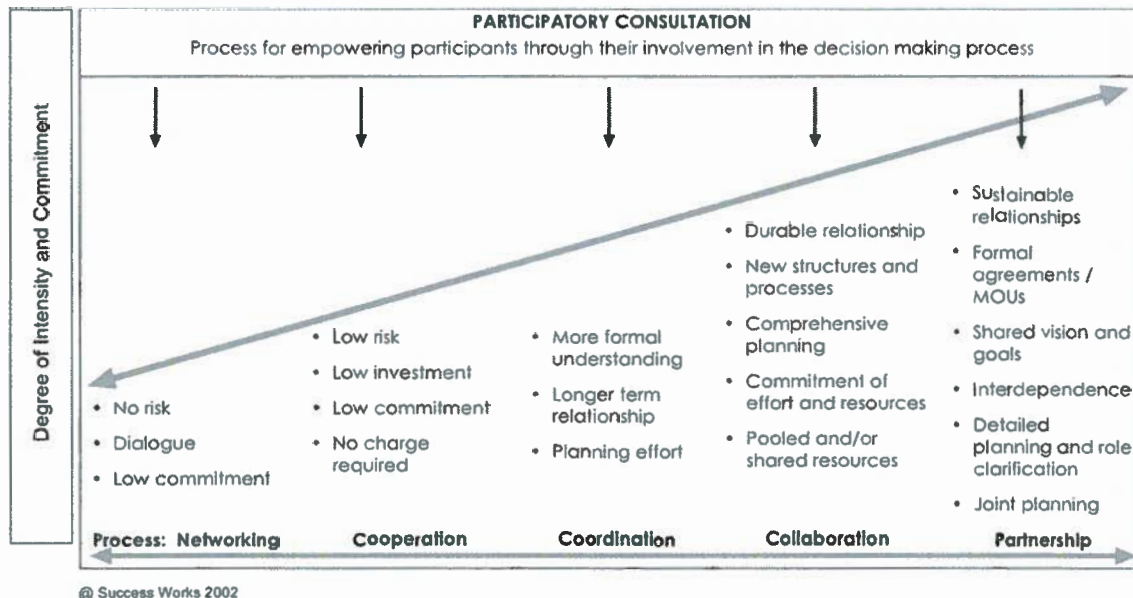
Table 2: The Collaboration Continuum

	Stage I	Stage II	Stage III	Stage IV
NATURE OF RELATIONSHIP	<i>Philanthropic > Transactional > Integrative > Transformational</i>			
• Level of Engagement	<i>Low ← ————— → High</i>			
• Importance to Mission	<i>Peripheral ← ————— → Central</i>			
• Magnitude of Resources	<i>Small ← ————— → Big</i>			
• Type of resources	<i>Money ← ————— → Core Competencies</i>			
• Scope of Activities	<i>Narrow ← ————— → Broad</i>			
• Interaction Level	<i>Infrequent ← ————— → Intensive</i>			
• Trust	<i>Modest ← ————— → Deep</i>			
• Internal change	<i>Minimal ← ————— → Great</i>			
• Managerial Complexity	<i>Simple ← ————— → Complex</i>			
• Strategic Value	<i>Minor ← ————— → Major</i>			
• Co-creation of value	<i>Sole ————— → Conjoined</i>			
• Synergistic value	<i>Occasional ← ————— → Predominant</i>			
• Innovation	<i>Seldom ← ————— → Frequent</i>			
• External system change	<i>Rare ← ————— → Common</i>			

(Austin, 2012, 2000)

Determining the best structure for a partnership requires a “Continuum of Joint Effort” (VCOSS, n.d.a p. 2) or the ability to effectively make good decisions based on the needs of each partner involved and agreement of expected outcomes (VCOSS, n.d.a p. 2). Visual tools such as that shown in Figure 6 can be effective in assisting potential partners to determine the best partnership structure for their unique situation.

Figure 6: Continuum of Joint Effort



(VCOSS, n.d.a, p. 2)

In reviewing the many ways in which a partnership can be structured key learnings include the idea that partnerships run along a continuum from informal (i.e. low commitment and risk) to formal (i.e. formal MOU's, joint planning, more risk). Further, although a particular partnership structure may be successful in one situation it may not be in another. In other words partnership structures are not necessarily transferrable to other situations and environments, even those that are similar, but can be good starting points to explore options. Regardless of the agreed upon partnership structure, benefits and challenges will inevitably arise and these are explored in the next section.

4.4. Partnership Benefits and Challenges

Building strong, collaborative partnerships and individual and organizational capacity are increasingly seen as essential for building healthy communities (Boydell, 2007, p. 6; BC Healthy Communities, 2015; Parkinson, 2006, p. 16; Mattessich & Rausch, 2013, p. 4). Doing so has both benefits and challenges.

Benefits

According to the Victorian Council of Social Service Partnership Practice Guide 1 which can be found in Appendix 3, benefits to partnership development include:

- Partnerships can allow for diverse thinking and values to lead to better outcomes;
- Partnerships provide opportunity to share a workload and resources;
- Partnerships build capacity of their members;

- Partnerships can create the environment for taking risks in developing new services models;
- Partnerships create the motivation for people to pull together, which in turn drives and sustains the partnership.

(VCOSS, n.d.a, p. 3)

Additionally, the Partnership Toolkit: Tools for building and sustaining partnerships identifies further benefits to partnership development including:

- Carry out an initiative that would be difficult or could not be done alone and/or deliver a more comprehensive program or service than could be done alone – a more holistic approach to services and programs;
- Promote exchange of information; share knowledge, know-how and ideas;
- May be the only way for new, small volunteer-based organizations to access funding;
- Enable more effective exchange, sharing or referral of clients or customers;
- Be more efficient by avoiding duplication or overlap;
- Act as a more forceful lobby or advocate;
- Ensure greater accountability, responsiveness and transparency;
- Enhance community participation – increase involvement in decision-making;
- Facilitate the sustainability/survival of an organization or initiative.

(Collaboration Round Table, 2001, p. 10)

Challenges

Despite the many benefits to partnership development there are also many challenges. Understanding these challenges can help minimize their impact on a partnership.

One of the key challenges and necessities in building any partnership is trust (The Partnering Initiative [TPI], n.d.; Kohm, 1998, p. 38). Often the most successful partnerships are those who have done the groundwork to build trust through “long-term alliances” (Parkinson, 2006, p. 14) with partners over time (Cavaye, n.d., p.14, VCOSS, n.d.a, p. 3). Without the basic foundation of trust it is very difficult to move forward with any partnership and the sharing of information, knowledge and resources (Becerra et. al, 2008, p. 691; Huxham & Vangen, 2004, p. 194).

Moreover, the literature cites a number of other challenges in building partnerships which include:

- Agreeing on a common aim, purpose, vision, goals, roles and communication expectations for the partnership (Parkinson, 2006, p. 10; Collaboration Round Table, 2001, p.8; Huxham & Vangen, 2004, p. 191; VCOSS, n.d.a, p. 3);

- Commitment of sufficient time and resources (human, information, and financial/funding) (Collaboration Round Table, 2001, p.11; Huxham &Vangen, 2004, p. 195; Parkinson, 2006, p. 9; VCOSS, n.d.a, p. 3);
- Partnerships are dynamic and ever changing systems impacted by where in the organizational lifecycle any one partner organization may lay making it a challenge to manage (VCOSS, n.d.b., p. 2; Meadows, 1999, p. 2; Huxham &Vangen, 2004, p. 196; TCC Group, 2006, p. 2);
- Maintaining a balance of power and authority among partners (reporting, decision making and accountability) (Parkinson, 2006, p. 11; Huxham &Vangen, 2004, p. 193; Collaboration Round Table, 2001, p. 15; VCOSS, n.d.a, p. 3);
- Leadership capacity – at the organizational level and the partnership level to ensure the respect, confidence, experience, skill and knowledge needed to build and maintain momentum of the partnership through its lifecycle (VCOSS, n.d.a, p.3; Huxham &Vangen, 2004, p. 198; Collaboration Round Table, 2001, p. 17; TCC Group, 2006, p. 2);
- Perceived or real risk (financial; legal; reputation; independence; operations; failure) (Collaboration Round Table, 2001, p. 11).

Although there are many benefits and challenges to partnerships identifying the range of factors and smart practices that impact the overall success of a partnership is an important part of the process. Hence we look at success factors in the next section.

4.5. Building Successful Partnerships – Factors and Smart Practices

“Our experience suggests that good partnerships are based on three core principles: **Equity** (where everyone’s contribution is valued and respected); **Transparency** (where partners deal with each other in an open and honest manner) and **Mutual Benefit** (where it is legitimate for all partners to expect a ‘return’ for their own organisation / sector from being partners) (Tennyson et. al., n.d., p. 4).”

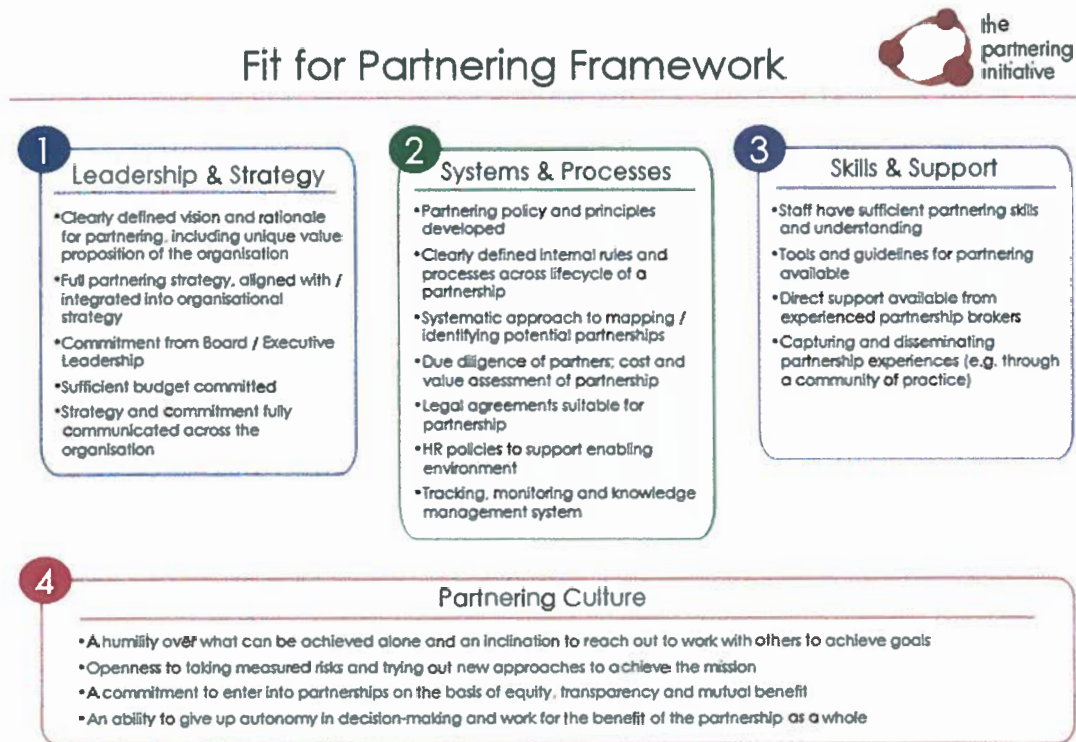
There are a number of factors and smart practices that can help guide a partnership to a successful outcome. In *Collaboration: What Makes it Work*, Mattessich et. al. (2001, p. 4), identify twenty different factors broken into six categories (Table 3) that impact the success of a partnership and are cited throughout the literature.

Table 3: Twenty Factors Impacting Partnership Success

Category	Success Factor
1. Environment	<ul style="list-style-type: none"> • History of collaboration or cooperation in the community; • Collaborative group seen as a legitimate leader in the community; • Favourable political and social climate.
2. Membership Characteristics	<ul style="list-style-type: none"> • Mutual respect, understanding and trust; • Appropriate cross section of members; • Members see collaboration as in their self-interest; • Ability to compromise.
3. Process and Structure	<ul style="list-style-type: none"> • Members share a stake in both process and outcome; • Multiple layers of participation; • Flexibility; • Development of clear roles and policy guidelines; • Adaptability; • Appropriate pace of development.
4. Communication	<ul style="list-style-type: none"> • Open and frequent communication; • Established informal relationships and communication links.
5. Purpose	<ul style="list-style-type: none"> • Concrete, attainable goals and objectives; • Shared vision; • Unique purpose.
6. Resources	<ul style="list-style-type: none"> • Sufficient funds, staff, materials, and time; • Skilled leadership.

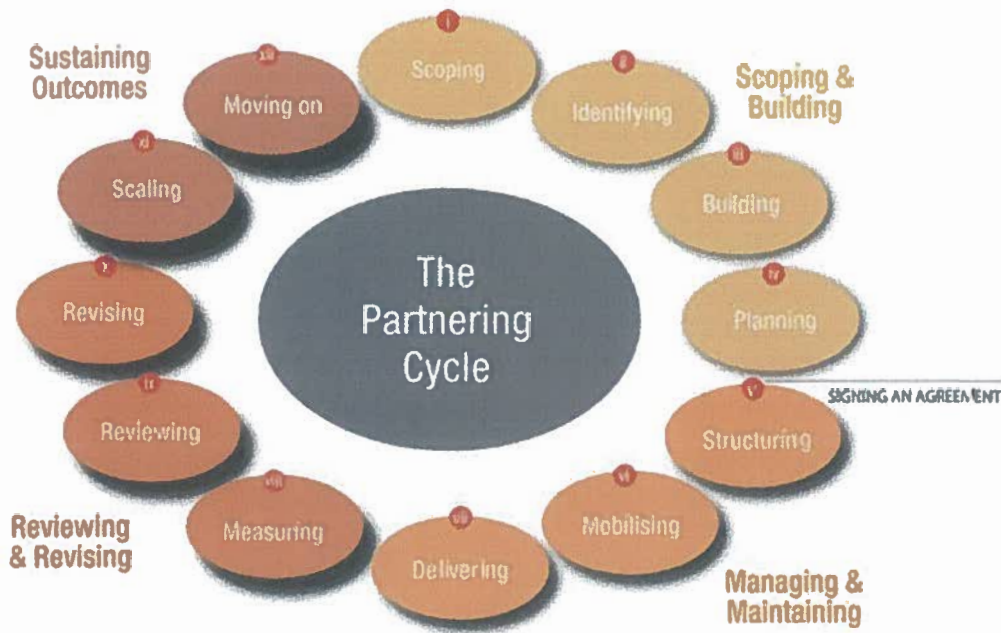
Similar to Mattessich et. al., The Partnering Initiative (n.d., p. 1) provides a visual framework (Figure 7) for partnership development that encompasses factors and smart practices related to leadership and strategy; systems and processes; skills and support and ensuring a partnering culture as considerations when working towards a successful partnership outcome.

Figure 7: Fit for Partnering Framework



When you consider the amount of time, resources and commitment it takes to start, build and maintain a successful partnership strong leadership is often identified as the key ingredient (Parkinson, 2006, p. 9; The Partnering Initiative, n.d., p. 1; Huxham & Vangen, 2005, p. 227; Collaboration Roundtable, 2001, p. 17). The need for a senior leader with the authority to make decisions; who has the capacity, experience and skills needed to lead; and is committed to actively guide the partnership through each step of the partnering cycle (Figure 8) is an important consideration.

Figure 8: The Partnering Cycle

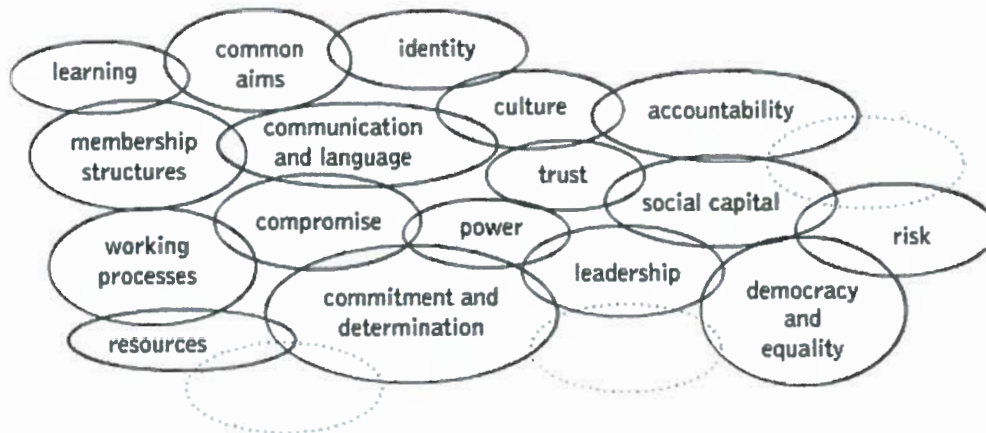


(Tennyson et. al., n.d., p. 3)

In summary, the literature review demonstrates the importance of linking the global context and “work of cities” (Clarke & Gaile, 1998, p. 4) and where they fall along the social centered policy to market centered policy spectrum (Savitch & Kandor, 2002, p. 142) to the benefits and challenges of partnership structures; systems and processes; and tools used in partnership development and how decisions are made.

The definition and reasons for deciding to partner are complex, dynamic and unique to each partnership and organization involved (Becarra et. al., 2008, p. 691; Eberts & Erickcek, 2002, p. 36; VCOSS, n.d.a, p. 3; Kohm, 1998, p. 38). As are the social, environmental and political contexts in which any given partnership is built (Clarke & Gaile, 1998, p. 210; Savitch & Kandor, 2002, p. 215). Further, there is no linear or right path in which a partnership needs to follow which is evidenced by the many factors outlined in the literature and Figure 9 below (Tennyson et. al., n.d., p. 4; Ho, n.d., para. 4).

Figure 9: Partnership Complexity



(Huxham & Vangen, 2005, p. 12)

Decision making is dependent on those participating in the partnership and the agreed upon structure; benefits and challenges identified; and the factors and smart practices used to work towards a successful outcome.

The information revealed in the literature review and summarized in Table 4 below coupled with client meetings provided the details needed to design an interview process and questions aimed at answering the research question.

Table 4: Summary of Literature Review Themes

Literature Review Themes	
Category	Themes
4.1 Big Picture Context	<ul style="list-style-type: none"> No city or community is the same – what works for one may not work for another. There are many paths to economic development. Dependent on what bargaining context decisions begin from. Decision making and policies falls along a social-centered to market-centered continuum. Shift towards fourth wave approaches – connecting local to global economies; growing and expanding human capital; increased use of telecommunications. Cities and communities have choice in decision making which are increasingly complex.
4.2 Partnership Structures	<ul style="list-style-type: none"> No partnership is the same – what works in one situation may not work in another even if they are similar. Defining and agreeing on a partnership structure requires a tremendous amount of time, resources and commitment from those involved.

	<ul style="list-style-type: none"> Partnership structures fall along a continuum or spectrum when it comes to formality, intensity and commitment and depends on the nature of the relationship.
<p>4.3 Benefits and Challenges</p>	<p><i>Common Benefits include:</i></p> <ul style="list-style-type: none"> Diverse thinking lead to better outcomes; shared workload, resources; capacity building; can create environment to take risks and innovate; creates a comprehensive/holistic approach; ability to leverage funding; efficiency through reduced duplication in services/programs. <p><i>Common Challenges include:</i></p> <ul style="list-style-type: none"> Lack of trust – it takes time to build trust and is the foundation to any partnership; lack of time/commitment/resources; agreeing on partnership expectations/purpose/goals; leadership capacity; balance of power and accountability.
<p>4.4 Smart Practices for Successful Partnerships</p>	<ul style="list-style-type: none"> Equity, transparency and mutual benefit in aspects of partnership structure; systems and processes; and tools needed. Success factors related to environment; membership characteristics; process and structure; communication; purpose; and resources must be considered for success to occur. Strong leadership with the authority to make decisions; who has the capacity, experience and skills needed to lead; and is committed to actively guide the partnership is essential.

The next section provides an overview of the research findings that included 15 open-ended interview questions broken into three sections: Partnerships; Systems and Processes; and Tools that were developed and delivered through face-to-face semi-structured interviews. A summary of interview questions is available in Appendix 2.

5. FINDINGS

The purpose of this section is to provide an overview of the interview questions and how they were developed followed by the findings from participant interviews and their responses.

5.1. Interview Questions

In preparation for primary data collection with interview participants, questions had to be developed with the aim of answering the research question:

What smart partnership practices (i.e. partnership structure; systems and processes; and tools) can Employment Service Centres implement to connect labour supply and demand with major development projects occurring in their region.

The process to inform the development of the questions included meetings with the client to identify what they wanted to learn (see Section 3) from the research and completing a comprehensive literature review. As a result 15 open-ended interview questions broken into three sections: Partnerships; Systems and Processes; and Tools were developed and face-to-face semi-structured interviews were conducted between May and July 2014. A summary of interview questions is available in Appendix 2.

Based on the participant responses from the interview questions I have broken down the remaining findings section to correspond with the question categories presented above.

- Section 5.2. Partnership Development will review the findings from responses to interview questions 1-6. The findings from this section are important because they provide insight into the how and why partnerships may develop and different types of partnership structures that exist.
- Section 5.3. Systems, Processes and Tools will review the findings from responses to interview questions 7-15. The findings from this section are important because they provide insight into the range of systems, processes and tools that can be used in partnership development.
- Section 5.4. Need for Leadership – A Champion will review the overarching finding that came about as a result of completing all of the interview questions.

The findings presented in Section 5.2.-5.4. are important because they provide tangible examples of partnership structures; systems and processes; and tools that when analyzed in the context of the literature help support the research goal to identify smart practices that Employment Service Centres can consider and potentially implement to connect labour supply and demand with major development projects occurring in their region.

5.2. Partnership Development

Section A – Partnerships included questions 1-6. They are summarized in the table below along with the key themes that were identified from the interviews that will be discussed in greater detail throughout section 5.2.

Interview Question	Key Themes Identified
1. What is your relationship with North Island Employment? How did your partnership with North Island Employment begin?	Combination of formal and informal partnership structures. A need was identified and solutions involved all.
2. From the context of linking labour supply and demand to support the major projects what has worked well in this partnership?	Combination of formal and informal partnership structures and strong leadership.
3. From the context of linking labour supply and demand to support the major projects what challenges, if any has this partnership faced?	Funding, managing workload (time commitment), communication.
4. From the context of linking labour supply and demand to support the major projects what has not worked well for this partnership?	Unanimous response from all interviewees that there was nothing that did not work well for the partnership. All four say it is a learning opportunity even if something didn't go as planned.
5. From the context of linking labour supply and demand to support the major projects has this partnership helped to prepare the community? If yes, how so? If no, why not?	All interviewees answered yes due to the systems, processes and tools used in conjunction with existing partnerships and strong leadership.
6. Does this partnership play a role in preparing the community to capitalize on economic diversification opportunities and continued growth after the major projects are complete 5-7 years from now? If yes, how so? If no, why not?	Interviewees agreed there was great opportunity to capitalize and partnerships helped provide a foundation but all felt it needed to be a municipal approach to capitalizing on the major projects.

The following section explores in greater detail findings related to the key themes of partnership structure; partnership foundation; and partnership challenges identified above. All of which are important in helping to answer the research question.

Partnership Structure

The findings from this research identified two distinct structures for partnership development with the partnership between NIEFS and CRDCC being described as a formal

partnership structure between two community-based organizations. The second structure is described as an informal partnership structure and speaks to the partnership between NIEFS, CRDCC and senior representatives from both the JHGSRP and NIHP.

For the purpose of this research an informal partnership can be defined as achieving results related to a particular outcome when the collaboration does not require a formal agreement (i.e. MOU, work plan, etc.) and is loosely structured and perhaps related more to the sharing of knowledge and resources alternatively a formal partnership can be defined as being based on a specific objective and is often measured and includes formal systems and processes such as a memorandum of understanding (MOU), annual work plan and regularly scheduled meetings.

According to the literature, laying the foundation for a formal partnership more often than not includes agreed upon systems, processes and policies that guide the partnership with agreed upon details often captured in a signed MOU (VCOSS, n.d.c, p. 4). This approach is consistent with the formal structure in which NIEFS and CRDCC partnership operates.

Conversely, the less structured, informal nature in which the partnership between NIEFS, CRDCC and senior leaders from both the JHGSRP and NIHP rely more on individual relationships between the aforementioned partners (MacAusion, 2006, p. 160).

Regardless of the formal or informal structure of the partnership, the one thing in common that all four interview participants and their associated organization had was a need in which the other partners had potential solutions and the ability to leverage the capacity of each for the greater goal of linking labour supply and demand to the major projects.

Partnership Foundation

Partnerships are hard work to build and maintain. Well before discussions about the major projects began, NIEFS and CRDCC had committed time, resources, and leadership to foster a strong foundation between the two organizations which came about during a time of significant economic upheaval in the community as a result of the 2008 global economic downturn. According to interviewees from NIEFS and CRDCC this foundation is built on trust; respect; different but complementary organizational values and mandates; open communication; and strong leadership which resulted in formalizing the partnership with an MOU.

Interview findings revealed numerous examples of projects that assisted NIEFS and CRDCC build trust and confidence in each other supporting the formalization of their partnership. Examples include:

1. Partnered on the Labour Market Partnership (LMP) entitled “Workforce Development within a Rural Transitioning Economy.”

2. Supported the NIEFS led initiative culminating in the Community Accord in Support of Workforce Development.
3. Both organizations co-presented on numerous occasions to other community organizations; municipal government; and First Nations complementing each other's role in labour supply and demand in the community.
4. Purposely linking organizational strategic planning activities through active participation in respective organizations.
5. Joint relationship building with senior representatives of the JHGSRP and NIHP.

As a result of the formal partnership and strong foundation, the two organizations were respected leaders in the community allowing them to quickly mobilize and identify ways to collaborate and support major development projects in the community as they arose.

Both JHGSRP and NIHP identified this as an opportunity for them to leverage capacity to support the labour supply and demand needs of these large scale projects and engage with the community from a holistic approach. This allowed the partnerships to build long before any shovels were in the ground.

Partnership Challenges

Interviewees highlighted a number of challenges in partnering to support the labour supply and demand needs of the major projects occurring in the area. Table 5 summarizes the challenges identified.

Table 5: Partnership Challenges

Challenge	Key Finding
Funding	<ul style="list-style-type: none"> • Organizational funding is generally vertical in nature and specific to organizational mandate making it difficult to allocate resources to partnership development activities if it is not within the funding mandate leading to voluntary participation because the work adds value.
Managing Workload	<ul style="list-style-type: none"> • Partnership development requires an on-going commitment of time and resources generally outside the day to day operations of an organization and balancing workload between the partners is challenging.
Leadership Continuity	<ul style="list-style-type: none"> • Identifying the difference between partnership development between organizations because it makes good strategic sense and partnership development between leaders because they see the benefit in working together.
Communication	<ul style="list-style-type: none"> • As organizations with separate but complementary mandates, communication is key to ensuring community messaging is

done in a consistent manner that supports the linking of labour supply and demand and demonstrates the value of partnership development to the greater community. The challenge is keeping partner organizations up to date on an ongoing basis so opportunities to co-message can be delivered.

5.3. Systems, Processes and Tools

Section B and C – Systems and Processes and Tools respectively included interview questions 7-15. They are summarized in the table below along with the key themes identified from the interviews that will be discussed in greater detail throughout section 5.3.

Interview Question	Key Themes Identified
<i>Section B – Systems and Processes</i>	
7. What steps, if any did you take to formalize this partnership?	<ul style="list-style-type: none"> - Different systems and processes for community organization partnerships (i.e. NIEFS and CRDCC) and partnerships with major projects (i.e. JHGSRP and NIHP) categorized in the findings as internal and external respectively. - Memorandum of Understanding (MOU); agreed upon annual work plans; regularly scheduled meetings with set agendas.
8. Does this partnership help reduce overlap in existing services? If yes, how so?	<ul style="list-style-type: none"> - Strong communication; information sharing; and leadership between organizations help to minimize duplicating services and coordinate efforts and messages.
9. In your opinion what requirements are needed to replicate this partnership model in other similar communities undergoing major projects?	<ul style="list-style-type: none"> - Organizational and community capacity and the need for a “Champion” with strong leadership and decision making abilities.
10. Reflecting back, what would you do the same?	<ul style="list-style-type: none"> - Interviewees unanimously agreed that they would not do anything differently but were quick to recognize that this process would look different for different communities.
11. Reflecting back, what would you do differently?	
<i>Section C - Tools</i>	
12. What tools did you use that were successful in linking labour supply and demand to support the major projects? Why were these tools a success?	<ul style="list-style-type: none"> - Major projects portal; NIEFS website; newsletters; events and activities. - Coordinated efforts by “Champions” and strong leadership from all partners (NIEFS, CRDCC,

	JHRGP and NIHP) led to success.
13. What tools did you use that were not successful in linking labour supply and demand to support the major projects? Why were these tools not successful?	- None were identified
14. What 'smart practices' or tools would you recommend to other similar communities faced with major development projects?	- Interviewees referred to the systems, processes and tools discussed above as 'smart practices' any community could consider.
15. Any final comments to add?	- The importance of starting early (years before shovels are ever in the ground) conversations around partnership and linking labour supply and demand to major projects occurring in a region. - The need for a "Champion" who is a Senior Leader with strong leadership; capacity; and commitment is necessary for successfully linking labour supply and demand in support of major projects occurring in a region.

The following section explores in greater detail findings related to the key themes of systems, processes and tools identified above. All of which are important in helping to answer the research question.

Research findings identified that the systems, processes and tools used fell into two distinct categories: 1. Internal – systems, processes and tools used to coordinate formal partnerships and 2. External – systems, processes and tools that community based organizations such as NIEFS and CRDCC used together or separate in their work with JHGSRP and NIHP.

Internal

To effectively manage formal partnerships between interviewees namely NIEFS and the CRDCC a range of internal systems, processes and tools were incorporated to keep them organized and connected. Table 6 summarizes key findings related to the internal systems, processes and tools used.

Table 6: Internal Systems, Processes and Tools – Formal Partnerships

System, Process or Tool	Key Finding
Memorandum of Understanding (MOU)	<ul style="list-style-type: none"> Formal written agreement signed by participating parties outlining the terms of the partnership.
Annual Work Plan	<ul style="list-style-type: none"> Annual review and creation of partnership work plan linking strategic planning and activities that guides the partnership throughout the year.
Regular Meeting Schedule	<ul style="list-style-type: none"> Agreed upon meeting schedule to ensure open dialogue and communication regarding annual work plan; updates on organizational operations; environment scan; opportunity for new projects etc. Meeting based on agreed upon agenda with meeting notes taken and distributed.
Sharing and linking labour market information and resources	<ul style="list-style-type: none"> As information and resources regarding the local labour market arise they are forwarded through email for possible follow up and discussion during regular meetings as the information relates to possible programs and services and funding opportunities.

External

The informal nature of the partnership between NIEFS, CRDCC and senior leaders from JHGSRP and NIHP led to a range of systems, processes and tools used to support the linking of labour supply and demand to the major projects. Some of which both NIEFS and CRDCC were involved in others were specific to a respective organization. Table 7 summarizes key findings related to the external systems, processes and tools used.

Table 7: External Systems, Processes and Tools

System, Process or Tool	Key Finding	Partners Involved
Regular Meetings & Information Sharing	<ul style="list-style-type: none"> Regular meetings throughout the life of the project for the John Hart were scheduled and attended by NIEFS and CRDCC where it made sense. These were informal in nature and allowed for updates and brainstorming on the project to occur. Formal meetings (agenda and meeting 	NIEFS, CRDCC, JHGSRP, NIHP

	<p>notes) attended by a range of community organizations including NIEFS, CRDCC, Industry Training Authority (ITA), Unions, the General Contractor for the NIHP among others to provide updates on the project and discuss opportunities to link labour supply and demand needs to the project.</p>	
Major Projects Portal	<ul style="list-style-type: none"> As a way to quickly disperse information regarding the JHGSRP the CRDCC worked with BC Hydro to develop an online tool called the Major Projects Portal which provided both projects with a resource to direct people to. The portal aimed to connect local potential sub-contractors to the projects. Regular updates posted to this site. Although not involved in the creation of the Major Projects Portal, NIEFS participated by sharing local LMI to post to the portal and encouraged job seekers to connect to resource as well as a tool for tracking projects and potential job opportunities with sub-contractors. 	CRDCC, JHGSRP
NIEFS Website	<ul style="list-style-type: none"> Primary tool that facilitates sharing and linking of local labour market information and resources useful for decision making and planning for all partners including one of the largest job boards on the North Island with upwards of 100,000 page views per month. NIEFS produces a quarterly Labour Market report that is distributed widely. 	NIEFS, CRDCC, JHGSRP, NIHP
Newsletters	<ul style="list-style-type: none"> NIEFS and CRDCC have active newsletters that target specific populations of interest for the major projects (i.e. business, employers, job seekers, community). Ability to quickly distribute important project information to appropriate audience. 	NIEFS, CRDCC, JHGSRP, NIHP

Events & Activities

- Numerous luncheons organized by CRDCC for the major projects to provide updates to the community.
- Speed Networking – Led by BC Hydro with NIEFS and CRDCC as participants organized two day speed networking and information sessions for interested sub-contractors and job seekers to connect directly with the winning proponent team.
- Follow up from the Speed Networking event were JHGSRP information sessions for job seekers facilitated by NIEFS weekly attended by hundreds of job seekers.
- Major project panel presentations offered as a stand-alone event organized by NIEFS in partnership with the ITA and Vancouver Island Construction Association and part of the annual CRDCC Business Expo.
- Targeted programming (i.e. Construction Job Search Series) providing entry level industry certificates for work on major projects.

NIEFS, CRDCC,
JHGSRP, NIHP

5.4. Need for Leadership – A Champion

The final but perhaps most important key finding that emerged from this research was the importance of leadership and the need for a Champion who had the authority to make decisions on behalf of the partner organizations.

There was consensus among the interview participants that without a Champion, success in the other research findings summarized in sections 5.1 and 5.2 would not have been possible and the major projects would have looked very different.

Although no single definition of Champion emerged a number of key descriptors related to leadership were identified by interview participants. Table 8 summarizes these key descriptors.

Table 8: Champion – Key Descriptors

Descriptor	Explanation
Senior Leader	Trusted and respected with the authority to make decisions (i.e. financial; human resources; new projects; partnership building etc.) on behalf of the organization. The right people are at the table.
Capacity	Possesses required skills and competencies to think strategically to identify opportunities to build strong organizations, partnerships and communities.
Committed	Willing to do the work and put in the time to build strategic partnerships because it is the right thing to do and is of value to the organization and the community.

5.5. Conclusion

In identifying how Employment Service Centres can support the linking of labour supply and demand to major development projects occurring in their region, the research findings suggest a range of strategies.

Strategies such as incorporating formal and informal partnership structures and a range of systems, processes and tools to support linkages are all important findings. The key finding that connects the strategies is the need for a Champion who is a trusted and respected senior leader able to make decisions on behalf of an organization; has the skills and competencies to think and plan strategically; and is committed to the work, time and process required to build strong, successful partnerships that support major development projects.

6. DISCUSSION

This section integrates the findings from the interview participants within the context of the literature review. A summary of literature review themes is again provided in Table 9 below. The purpose of this section is to relate the research findings to the research question presented at the beginning of this paper which is:

What smart partnership practices (i.e. partnership structure; systems and processes; and tools) can Employment Service Centres implement to connect labour supply and demand with major development projects occurring in their region.

Table 9: Summary of Literature Review Themes

Literature Review Themes	
Category	Themes
4.1 Big Picture Context	<ul style="list-style-type: none"> No city or community is the same – what works for one may not work for another. There are many paths to economic development. Dependent on what bargaining context decisions begin from. Decision making and policies falls along a social-centered to market-centered continuum. Shift towards fourth wave approaches – connecting local to global economies; growing and expanding human capital; increased use of telecommunications. Cities and communities have choice in decision making which are increasingly complex.
4.2 Partnership Structures	<ul style="list-style-type: none"> No partnership is the same – what works in one situation many not work in another even if they are similar. Defining and agreeing on a partnership structure requires a tremendous amount of time, resources and commitment from those involved. Partnership structures fall along a continuum or spectrum when it comes to formality, intensity and commitment and depends on the nature of the relationship.
4.3 Benefits and Challenges	<p><i>Common Benefits include:</i></p> <ul style="list-style-type: none"> Diverse thinking lead to better outcomes; shared workload, resources; capacity building; can create environment to take risks and innovate; creates a comprehensive/holistic approach; ability to leverage funding; efficiency through reduced duplication in services/programs. <p><i>Common Challenges include:</i></p> <ul style="list-style-type: none"> Lack of trust – it takes time to build trust and is the foundation to any partnership; lack of time/commitment/resources; agreeing on partnership expectations/purpose/goals; leadership capacity; balance of power and accountability.

<p>4.4 Smart Practices for Successful Partnerships</p>	<ul style="list-style-type: none"> • Equity, transparency and mutual benefit in aspects of partnership structure; systems and processes; and tools needed. • Success factors related to environment; membership characteristics; process and structure; communication; purpose; and resources must be considered for success to occur. • Strong leadership with the authority to make decisions; who has the capacity, experience and skills needed to lead; and is committed to actively guide the partnership is essential.
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Further, this discussion will help support the recommendations presented in section 7.

6.1. Partnership Development

The findings from the research identified three consistent themes related to smart partnership practices including: partnership structure; partnership foundation; and partnership challenges.

Given the global economic collapse in 2008 and the negative impact it had on the Campbell River and North Island economy as noted in section 2.4, an urgency to support the community through the crisis by building partnerships came about which according to the literature is not a unique response to rapidly changing economic conditions - strong or weak (Ryser et. al., 2012, p. 49; Ironside & Randall, 1996, p. 21; Barnes & Hayter, 1994, p. 303).

Partnership Structure & Foundation

An important finding from the research was the importance of both formal and informal partnerships in connecting labour supply and demand in support of major projects occurring in a region.

The formal partnership between NIEFS and CRDCC guided by an MOU and annual work plan are consistent smart practices for formal partnerships as discussed in the literature (Parkinson, 2006, p. 9; VCOSS, n.d.c, p. 4; Collaboration Round Table, 2001, p. 17). Of particular importance was that these partnership tools were years in the making and based on a foundation of trust which provided a "jumping off" (Cavaye, n.d., p.14) point that allowed them to quickly mobilize and work together through informal partnerships with the JHGSRP and NIHP to support these major projects.

The formal partnership between NIEFS and CRDCC provided a strong structure in which the informal partnerships with senior leaders from JHGSRP and NIHP grew. This research demonstrates consistency with the literature in that not all partnerships need to be formalized to be effective and the importance of informal partnerships should not be

discounted as they are often a response to an immediate need at a local level (Mobility Lab, 2011, p. 15).

A strong foundation based on trust as evidenced by the research findings is the key to a strong partnership regardless of structure (informal or formal) and without this basic ingredient it is very difficult to achieve a successful outcome. Further, research suggests that deciding to partner is not just about partnering for the sake of partnering but “is a means to an end” (Parkinson, 2006, p. 6) and in this case the end outcome had value for the respective organizations and the community as a whole.

Interestingly, as governments downsize and devolve responsibilities for a range of service delivery needs to the local level community-based non-profit organizations play an increasingly important role leading and supporting workforce and economic development initiatives at the community level (Meléndez, 2004, p. 2; Eberts, 2002, p. 1; Mobility Lab, 2011, p. 4). Given their knowledge and understanding of the assets, strengths and capacity of their community NIEFS and CRDCC played a key role in linking labour supply and demand in support of the JHGSRP and NIHP (Tyrell et. al., 2010, p. 208; Kretzman & McKnight, 1993, p. 1).

Partnership Challenges

When it comes to partnerships, challenges are just part of the process. In many cases, organizations voluntarily partner knowing the work adds value. Recognizing partnerships generally take more time than initially planned it is important to be realistic in terms of the amount of time and resources (financial, human, information) each organization can allocate to the partnership and appreciate that flexibility and open communication regarding managing the workload will be needed (Collaboration Round Table, 2001, p.11; Huxham & Vangen, 2004, p. 195; Parkinson, 2006, p. 9; VCOSS, n.d.a., p. 3; Mattessich et. al., 2001, p. 4). Some of the challenges arising from this research included: funding; managing workload; leadership continuity; communication; and information and resource sharing all of which are consistent with challenges presented in the literature.

For the most part, these challenges are seen as just part of the work it takes to “actively manage” (Huxham & Vangen, 2005, p. 250) a partnership (formal or informal). The research findings were consistent with this argument in that the commitment from the organizations (NIEFS, CRDCC, JHGSRP, NIHP) to continuously work to link labour supply and demand in support of major projects occurring in the region was evident through the systems, processes and tools used.

6.2. Systems, Processes and Tools

The literature provides many examples of partnership systems, processes and tools for assisting communities and organizations to work together (Mattessich et. al., 2001, p. 22; Austin, 2012, p. 734; Becarra et. al., 2008, p. 691; Eberts & Erickcek, 2002, p. 36; Victorian

Council of Social Services [VCSS] n.d.a, p. 3; Kohm, 1998, p. 38; Parkinson, 2006, p. 16; Collaboration Round Table, 2001, p. 10). Ultimately, success depends on the partnership structure, foundation and the systems, processes and tools used.

Savitch and Kandor (2002) argue that decisions regarding partnership systems, processes and tools are impacted by where a city falls along the social centered - market centered policy spectrum (Table 1). Based on the research findings an argument could be made that as a community Campbell River falls somewhere in the middle but closer to market centered policies overall in the decisions they make and the impact on local organizations.

The systems, processes and tools NIEFS, CRDCC, JHGSRP and NIHP incorporated into their formal and informal partnerships varied and included internal (MOU, annual work plan, regular meeting schedule, sharing and linking labour market information and resources) and external (regular meeting schedule, major projects portal, NIEFS website and job board, newsletters, events and activities) approaches.

Tools such as an MOU and annual work plan are well documented throughout the literature and are commonly used in partnerships. Other tools such as the major projects portal; speed networking events; and community committees are more innovative which speaks to the willingness of NIEFS, CRDCC, JHGSRP and NIHP to try new partnership and collaborative methods to support linking labour supply and demand in support of major development projects occurring in the region (Clarke & Gaile, 1998, p. 114).

In an increasingly complex global society referred to as the “contemporary economy” (Clarke & Gaile, 1998, p. 24) innovation in the systems, processes and tools communities and organizations use becomes needed in order to compete; sustain a healthy community; and provide different opportunities for different members of the community to be part of shaping successful development outcomes such as the case in Campbell River (Clarke & Gaile, 1998, p. 114). Interestingly, this example demonstrates that combining more commonly used systems, processes and tools in partnership development with more innovative practices can attribute to the successfully linking labour supply and demand in support of major development projects occurring in a region.

6.3. The Need for Leadership – A Champion

In this research, it was found that leadership and the need for a Champion who was a senior leader with the authority to make decisions; had the capacity, experience and skills needed to lead; and was committed to actively guiding the partnership through each step of the partnering cycle was paramount (Tennyson et. al., n.d., p. 3).

The research identified that NIEFS, CRDCC, JHGSRP and NIHP all had a Champion to lead the partnership forward towards a successful outcome regardless of whether the partnership was formal or informal. As noted by one of the interview participants, “One of

the main reasons this worked is because there was willingness among the leadership in these organizations to take risks and collaborate.”

In bringing the research findings together with the literature it is evident that the partnerships between NIEFS, CRDCC, JHGSRP and NIHP was strategic in nature and is an example of “collaborative advantage” (Huxham & Vangen, 2005, p. 3) whereby the successful outcomes that occurred would not have been possible without the partnership.

6.4. Conclusion

In reviewing the research findings in the context of the literature it becomes clear that there is no quick fix when it comes to smart partnership practices and it requires a tremendous amount of time, effort, patience and leadership to balance the complex nature of partnerships and the interrelated, moving pieces that impact the outcome (Huxham & Vangen, 2005, p. 12).

Every partnership, organization and community is unique as are the partnership structures; systems and processes; and tools used. When we consider whether the partnerships reviewed in this research could be replicated in other communities faced with major development projects occurring in their region there is no definitive answer.

In an era of continuing devolution of services from government to community-based organizations, those impacted will need to consider what partnership looks like for them (Meléndez, 2004, p. 2; Eberts, 2002, p. 1; Mobility Lab, 2011, p. 4). At the same time, understanding trends such as innovative and integrated approaches to partnerships (i.e. joint ventures; social innovation; social enterprise) will become an important consideration for any organization. This will become increasingly important in order to stay relevant and able to deliver services that best support clients and communities.

Moreover, organizations and communities faced with major development projects occurring in any community need to ask the question, “What happens when the major projects end?” Short-term, uncoordinated thinking will lead to missed opportunities to capitalize on these projects throughout the life of the project and beyond.

7. RECOMMENDATIONS

This section provides a number of recommendations for smart partnership practices (i.e. partnership structure; systems and processes; and tools) for community Employment Service Centers to consider in their effort to connect labour supply and demand with major development projects occurring in their region.

Moreover, these recommendations are also useful for NIEFS to benchmark key factors and smart practices as a way to evaluate current and future partnerships with other organizations to better prepare themselves for successful outcomes.

Recommendation 1: Develop both Formal and Informal Partnerships

Think bigger than just partnering to prepare for major projects. Build relationships early and consider building strong partnerships (informal and formal) as an organizational rule rather than exception.

Integrating this practice as an organizational value is important to building trust which is the foundation for any partnership and takes time to establish. It also fosters innovation and ideas to build on community strengths and assets and identify potential gaps. In so doing, organizations are quickly able to mobilize and act when they are faced with an opportunity. You never know when an opportunity will arise so being prepared with a “jumping off” (Cavaye, n.d., p.14) point is key to organizational survival, adaptability and resiliency.

Recommendation 2: Initiate Contact Early with Major Project Leaders

If organizations follow the recommendations presented they will be well positioned to initiate contact with major project leaders in the very early stages to demonstrate established partnerships within the community that provide benefit to the major project (i.e. labour; bylaws; suppliers; promotion etc.). It is in the early stages of major projects that innovative ideas are generated and the strategy and planning take hold (i.e. labour and skills matrix for the duration of a project). It is important for community organizations to be an integral part of those initial conversations to help shape how the major projects work within their unique community context creating a win-win for all involved.

That being said, it should be noted that even if organizations follow these recommendations there is no guarantee that the partnership will succeed. Given the dynamic nature of partnerships and ever-changing environments sometimes they just do not succeed and that is a normal part of the process and a learning opportunity for those involved.

Recommendation 3: Ensure Committed Leadership

Success of any partnership (formal or informal) depends on committed leadership with an identified Champion from each partner organization who is a senior leader with the authority to make decisions; has the capacity, experience and skills needed to lead; and is committed to “actively manage” (Huxham & Vangen, 2005, p. 250) the partnership through each step of the partnering cycle as outlined in section 6.3.

Identify early the difference between partnership development between two organizations because it makes good strategic sense and opportunity for “collaborative advantage” (Huxham & Vangen, 2005, p. 3) and partnership development between two leaders because they see the benefit in working together this will ensure the continuity of the partnership if there is a change in leadership.

Recommendation 4: Systems, Processes and Tools

Identify and agree upon systems, processes and tools that will be used throughout the partnership.

- Use The Wilder Collaboration Factors Inventory tool (Appendix 4), based on Mattessich et. al. (2001), Twenty Factors Impacting Partnership Success outlined in section 4.4.
- Use the Partnership Practice Guide 1-3 (n.d) (Appendix 3), which includes steps on preparing to partner, starting and building partnership and maintaining partnership. The templates in these guides may be useful tools throughout the partnership journey.
- Use the Partnering Cycle outlined in section 6.3 to guide the partnership through the various phases of the partnership lifecycle.
- Incorporate an evaluative tool to better articulate the successes achieved.

These tools will help any given organization deciding on whether or not to partner to determine how they are the same and how they are different from the research presented in this report and what systems, processes and tools will work best for them.

8. CONCLUSION

As communities and organizations are faced with increasingly complex issues that impact the overall health and well-being of a community, finding innovative ways to work together and build strong partnerships is a key ingredient to building healthy communities (BC Healthy Communities, 2015). With that said, building successful partnerships is hard work that requires a significant amount of time, resources and capacity to build and maintain. Given the challenges faced many communities and organizations choose not to partner. In this research the partnerships between NIEFS, CRDCC, JHGSRP and NIHP resulted in benefits that reached across the community which far outweighed the challenges faced.

Perhaps the question organizations need to consider when exploring partnership opportunities is not, "Should we partner?" But rather "What are the costs to the health of the community and our organization if we don't partner?" Reframing the question and using the many available systems, processes and tools that exist has the potential to truly change and impact what it means to build strong partnerships.

The findings and recommendations in this research can prove useful as a guide for other communities and local organizations such as Employment Service Centres to explore their role in linking labour supply and demand in support of major projects occurring in their region and how partnerships although hard work can bring tremendous benefits to the entire community ultimately building a healthy, sustainable community.

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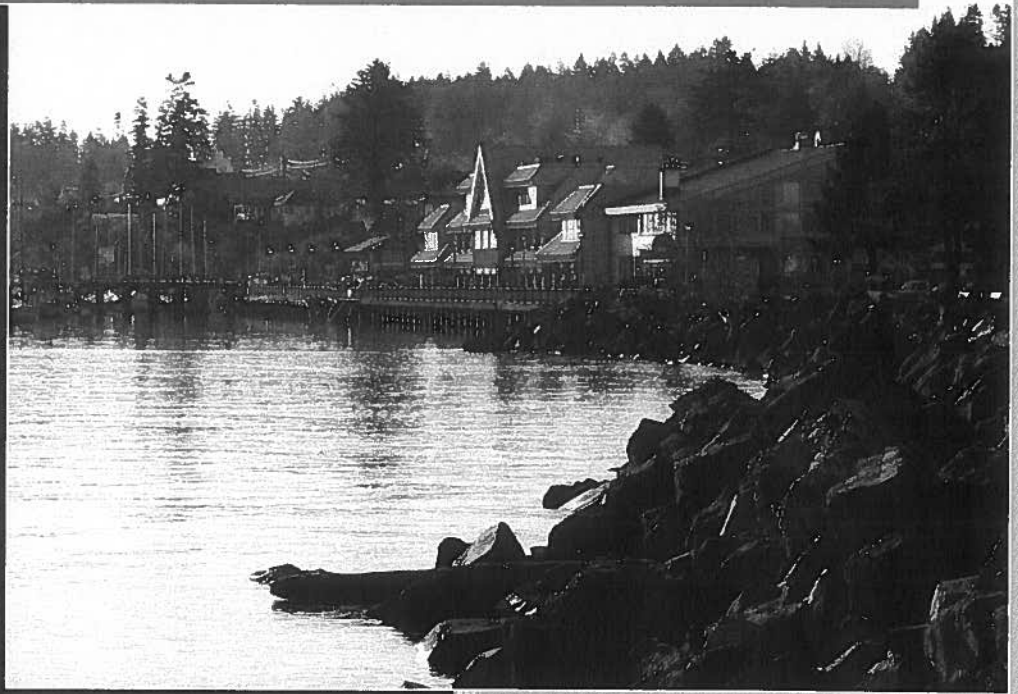
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10. APPENDICES

APPENDIX 1 – COMMUNITY ACCORD IN SUPPORT OF WORKFORCE DEVELOPMENT

2011

Campbell River Community Accord
in Support of Workforce Development





Community Accord in Support of Workforce Development, February 22, 2011

NORTH ISLAND EMPLOYMENT

... connecting people with work since 1986

Congratulations on Becoming a Signing Organization for the Community Accord in Support of Workforce Development!

Please find enclosed your Signed Copy of the Community Accord in Support of Workforce Development and a Copy of the Community Proclamation in Support of Workforce Development. It is our hope that the proclamation will be publicly displayed by your organization at your place of work. An electronic version of the Accord is available at http://www.niefs.net/Community_Accord_February_2011.pdf

The Community Accord was developed over the past two years and represents the collective efforts of Campbell River Employers, Educators, Business, Economic Development, Aboriginal, Immigrant, Community and Employment organizations to respond effectively to the changing needs of our community, workforce and employers. The signing of the Community Accord in Support of Workforce Development was a unique event in British Columbia. The newest organizations signing the Accord include the Strathcona Regional District and the Campbell River and Homalco Indian Bands.

The next steps in implementing the Accord are already underway! The Chamber of Commerce has almost completed its Campbell River Labour Market Study. The findings from this initiative will help to guide further implementation of workforce development in Campbell River and the needed steps to link economic, business and workforce development. Watch for the release of the Campbell River Labour Market Study final report in May 2011.

Our Community Accord in Support of Workforce Development has clearly demonstrated that communities have the ability to effectively respond to change through coordination and the commitment of organizations and their leaders to work together. Thank you for your participation! The next meeting of the Coordinated Workforce Development Committee will take place in June 2011.

Sincerely,



Doug Preston
Executive Director
North Island Employment Foundations Society



City of Campbell River

From the Office of the Mayor

- PROCLAMATION -

- WHEREAS** The complexity and fast-paced changes of today's economy create new opportunities and difficult challenges for Campbell River employers, employees and job seekers;
- AND WHEREAS** Campbell River's economic development and the ability of our businesses and industries to compete in the global economy depend on the availability of a qualified and skilled workforce;
- AND WHEREAS** The businesses and organizations of Campbell River are committed to creating a highly skilled workforce that will meet the human resource needs of our employers;
- AND WHEREAS** Learning develops individual and organizational knowledge and expertise and is critical to growing and sustaining a competitive advantage;
- AND WHEREAS** Our workforce development systems will work to ensure that Campbell River youth, adults, and adults re-entering the workforce obtain the job skills that are essential to achieving prosperity and a high quality of life;
- AND WHEREAS** An effective and coordinated system to educate, train, and retrain Campbell River residents depends upon a strong partnership between community, economic, aboriginal, education, employment organizations and the business community;

NOW THEREFORE I, Charlie J. Cornfield, Mayor of the City of Campbell River do hereby proclaim the week of February 21st to February 27th, 2011, as

"WORKFORCE DEVELOPMENT WEEK"

in the City of Campbell River, Province of British Columbia

Dated this 22nd day of February 2011.


Charlie J. Cornfield
MAYOR

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

We, the signers of this Accord, formally establish a collaborative partnership to support workforce development for Campbell River and area.

1.0 Purpose

We endeavour to build community capacity to sustain and continuously improve workforce development services that will assist people to become employed or self-employed and that will result in employers human resource needs being met.

2.0 Vision

An appropriately skilled workforce is a key asset for our traditional resource industries and the development of emerging industries. It is a powerful attractor for new investment and it supports an enabling environment for business success.

Broad, long-term partnerships across sectors and stakeholder groups enable employers to acquire skilled workforces and individuals to meet their employment, skill development and career goals.

Workforce development capacity is strong because economic development, social, education and skill development and employment services are linked through rich local economic and labour market information systems. Where there is shared interest in goal attainment, strategic planning across our organizations is linked.

We support the employment of those affected by economic change and those who are under-represented in the workforce – aboriginal peoples, immigrants and others. They are valued human resources that contribute to meeting employer's human resource needs.

Through our participation in this accord, employers will recruit and sustain skilled workforces that relate directly to their business's needs; job seekers will access the resources they need to develop and pursue their work and career goals.

Achievement of this Vision will result in businesses meeting their current and future human resource needs. Job seekers and employees will be able to develop and maintain sustainable and quality lifestyles for themselves and their families. Shared prosperity will result in healthy, growing communities that are able to sustain their economic, social, cultural, and environmental well being.

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

3.0 Goals

The Goals of this Vision include:

- 3.1 Workers meet their employment, skill development and career goals.
- 3.2 Employers meet their human resource needs in a timely and cost efficient manner.
- 3.3 The community is able to accurately describe its economic and demographic base, how it is changing, the required skills and those occupations that are and will be in demand.
- 3.4 Campbell River, its businesses and its communities achieve an economic competitive advantage.
- 3.5 The community successfully attracts working age families, immigrants and skilled workers.
- 3.6 There is increased retention and labour market participation of youth, aboriginal people, Immigrants, people with disabilities and people dislocated from traditional economic sectors.
- 3.7 There is an appropriate and coordinated supply of occupational skill development that meets the diverse needs of job seekers, employers and employees.
- 3.8 The relationships that are developed and the successes experienced through workforce development initiatives enables and enhances other community accords, development projects, initiatives, approaches and actions.

4.0 Principles

The Partners to this Accord agree that:

- 4.1 Workforce development is relevant and important to their organization's purpose and mandate.
- 4.2 Each partner organization has unique strengths to build upon and to contribute to the advancement of workforce development.
- 4.3 Collaboration between the Partners will advance the Vision and Goals of workforce development.
- 4.4 Community capacity, goodwill and productive relationships will arise from collaborating, communicating and planning in an effective and efficient manner.
- 4.5 Our shared Purpose, Vision, and Goals will be achieved with the support of leadership that is committed to concrete, specific, and measurable actions.
- 4.6 This Accord is inclusive and will link with other community initiatives that seek to build a healthy and prosperous future for our communities and region.

5.0 Endorsement of Accord and Signing Officer Signature

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

Appendix 1

1.1 Rationale

In June 2007 Statistics Canada released a feature article entitled, "Labour Force Projections for Canada, 2006 – 2031, which contained some sobering predictions about the combined impact of a low birth rate and aging population of Canada's labour force as well as its overall economy.

<http://statcan.ca/english/ads/11-010-XPB/pdf/jun07.pdf>

Since October 2008 a temporary recession has masked what were and will be significant skill and labour shortages across most sectors of the BC, Canadian and global economies. As we move out past 2011, a shrinking working age population and the attrition of an aging workforce will create skill and labour shortages that will challenge the ability of BC's communities, businesses and industries to fully participate in the economic prosperity that will result from a growing economy. These labour force and economic changes are driven by: the demographic shifts of an aging workforce; sharp declines in birth rates; globalization of financial systems, economies and supply chains; a shift to service driven economic growth; the impact of new technologies; the greening of economies; and the need for increased productivity to retain economic competitiveness. For Campbell River and the North Island our traditional resource sectors and goods producing industries will continue to be an important part of our regional economy. However, the shift over the past 10 years for Campbell River employment growth to be driven by service sector industries will continue to accelerate. The up-skilling of occupations will also continue to accelerate as employers work to increase the productivity of their workforces in response to global market competition.

1.2 Accord Definitions

Workforce Development

Workforce development is the education, employment and job-training efforts designed to help individuals to succeed in the workplace and to help employers get a skilled workforce.

Coordinated Workforce Development

Coordinated workforce development is the alignment of public policy and resources, employment services, education, and training and skill development systems so they meet the human resource needs of employers and the employment, learning and career goals of employees and job seekers.

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

Community

A community is a specific group of people who all hold something in common. Community is associated with two key aspects; firstly, people who share locality or geographical place; secondly, people who are communities of interest. Communities of interest are groups of people who share an identity and/or a purpose.

Community Capacity Building

Community capacity building is the activities, resources and support that strengthen the skills, abilities and confidence of people and community groups to take effective action and leading roles in the development of their communities.

Appendix 2

2.0 Accord Action Plan

To build the foundation upon which this Accord will stand, partners to the Accord will:

- 2.1 Move the Accord through internal organizational approval processes by October 30th, 2010
- 2.2 Participate in a formal, public signing of the Accord on February 22nd, 2011
- 2.3 On an on-going basis, create strategies to seek and receive endorsements of other stakeholders and the community at large for joining onto this Accord
- 2.4 Identify leaders and champions who will take forward the Accord's purpose, vision, goals, and principles within their respective organizations, industries and sectors
- 2.5 Meet in October 2010 to identify how and when to link future initiatives, and to establish a work plan for achieving the Accord's purpose, vision and goals
- 2.6 Reflect in their strategic and operational plans their commitment to support this Accord, its purpose, vision, goals and principles
- 2.7 Work to help the community proactively identify demand and supply side labour market information and the needed infrastructure, skills and human resources to support a robust, sustainable community
- 2.8 Where there are common goals and/or strategies, organizations will seek to link actions that will enhance workforce development

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

- 2.9 Develop a SMART action plan that includes concrete actions with measurable and reportable outcomes in four areas:
- 2.9.1 a strategic plan for coordinated workforce development in Campbell River and the North Island, partly based on mapping the interests, services, resources, and current partnerships of the organizations involved with workforce development
 - 2.9.2 a coordinated approach to collecting, sharing, and disseminating community-based economic and labour market information
 - 2.9.3 a strategic communications and marketing plan for coordinated workforce development in Campbell River and the North Island
 - 2.9.4 engagement with the City of Campbell River to have workforce development reviewed and included in the Sustainability Section in the redevelopment of the Official Community Plan

Appendix 3

3.0 Communication and Correspondence

Communication regarding this document should be sent to:

Doug Preston, Executive Director
North Island Employment Foundations Society
870C – 13th Avenue, Campbell River, BC V9W 4H2
Email: Doug.Preston@niefs.net Tel: 250-286-3441

Campbell River Community Accord in Support of Workforce Development

February 22, 2011



North Island Employment Foundations Society

Nickie Polson, Board Chair



Campbell River Chamber of Commerce

Gary Thulin, President



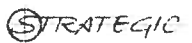
City of Campbell River

Andy Laidlaw, City Manager



Cruise HR Solutions

Brian Cruise, President



Strategic Forest Management

Jonathan Lok, Principal, General Manager



North Island College

Jan Lindsay, President



Pioneer Home Hardware

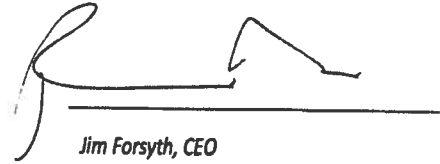
Gary Thulin, Owner, General Manager

Campbell River Community Accord in Support of Workforce Development

February 22, 2011



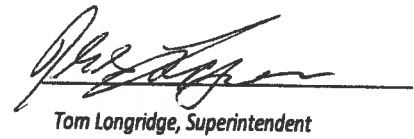
Skyline Consulting



Jim Forsyth, CEO



School District #72



Tom Longridge, Superintendent



North Vancouver Island Aboriginal Training Society



Bob Anderson, Manager



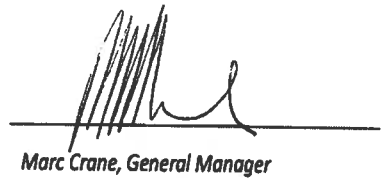
Campbell River Multicultural and Immigrant Society



Rachel Blaney, Executive Director



Community Futures Strathcona



Marc Crane, General Manager



Vancouver Island North Film Commission (INFILM)



Roger McDonell, Board President



Campbell River Creative Industries Council



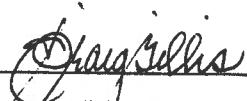
Cheryl O'Connell, Board President

Campbell River Community Accord in Support of Workforce Development

February 22, 2011



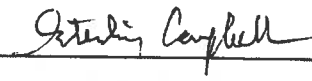
Campbell River Daybreak Rotary



Craig Gillis, President



Campbell River Noon Hour Rotary



Sterling Campbell, President



**Campbell River Economic Development
Corporation (Rivercorp)**



Cheryl O'Connell, Board Vice Chairperson



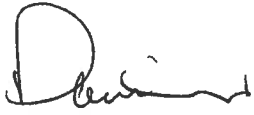
London Drugs



Warren Cook, Store Manager



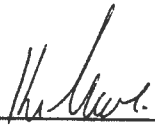
West Coast Wealth Management Ltd.



Dave Gordon, Director



Marine Harvest Canada



Ken Crewe, Human Resources Director



Meyers Norris Penny LLP



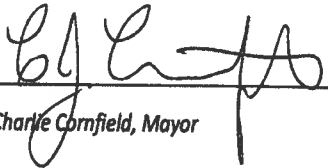
Cathy Voth, Senior Manager

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

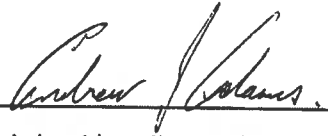


City of Campbell River Council


Charlie Cornfield, Mayor



City of Campbell River Council


Andrew Adams, City Councillor



City of Campbell River Council


Roy Grant, City Councillor



City of Campbell River Council


Ryan Mennie, City Councillor

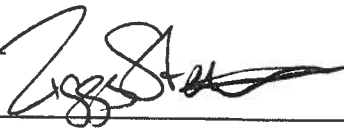


City of Campbell River Council


Claire Moglove, City Councillor



City of Campbell River Council


Ziggy Stewart, City Councillor



City of Campbell River Council


Mary Storry, City Councillor

Campbell River Community Accord in Support of Workforce Development

February 22, 2011

CANACCORD Wealth
Management

Canaccord Wealth Management



Andrew Leitch, Insurance Advisor


SHOOK WICKHAM BISHOP & FIELD

Shook Wickham Bishop Field



Michael Boulet, Associate

PERISCOPE PROMOTIONS


Periscope Promotions



Ed Falstrom, Owner

nvi MINING LTD.
MYRA FALLS OPERATIONS


NVI Mining Ltd



Robert Behrendt, General Manager


CAPACITY FOREST MANAGEMENT


Capacity Forest Management



Corby Lamb, President

ROYAL COACHMAN PUB

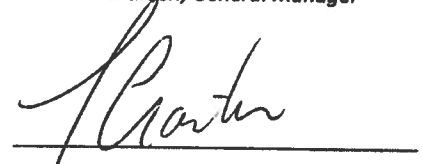
Royal Coachman Inn



Theresa Marson, General Manager

DA

Discovery Specialty Advertising



Terri Cranton, Owner

Campbell River Community Accord in Support of Workforce Development

February 22, 2011



Hilcam Trophies & Engraving

Terri Cranton, Owner



Campbell River Indian Band

Jason Price, Councillor



Homalco Indian Band

Alison Trenholm, Councillor and
Band Manager



Strathcona Regional District

Brian Reardon, Chief Administrative
Officer



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APPENDIX 2 – INTERVIEW QUESTIONS

**Building Connections: A Case Study in Linking Labour Supply and Demand
Supporting Major Development Projects**

Interview questions for this research project were developed based on an academic literature review related to partnership building and how community organizations work together to identify smart practices; systems and processes; and tools aimed at helping them prepare for major development projects.

Interview Questions

Section A – Partnerships

1. What is your relationship with North Island Employment? How did your partnership with North Island Employment begin?
2. From the context of linking labour supply and demand to support the major projects what has worked well in this partnership?
3. From the context of linking labour supply and demand to support the major projects what challenges, if any has this partnership faced?
4. From the context of linking labour supply and demand to support the major projects what has not worked well for this partnership?
5. From the context of linking labour supply and demand to support the major projects has this partnership helped to prepare the community?
If yes, how so?
If no, why not?
6. Does this partnership play a role in preparing the community to capitalize on economic diversification opportunities and continued growth after the major projects are complete – 5-7 years from now?
If yes, how so?
If no, why not?

Section B – Systems and Processes

7. What steps, if any did you take to formalize this partnership?
8. Does this partnership help reduce overlap in existing services? If yes, how so?

9. In your opinion what requirements are needed to replicate this partnership model in other similar communities undergoing major projects?

Probe: Are there common conditions/smart practices needed for success?

Are there common conditions for failure?

Are there other organizations missing?

10. Reflecting back, what would you do the same?

11. Reflecting back, what would you do differently?

Section C – Tools

12. What tools did you use that were successful in linking labour supply and demand to support the major projects? Why were these tools a success?

13. What tools did you use that were not successful in linking labour supply and demand to support the major projects? Why were these tools not successful?

14. What 'smart practices' or tools would you recommend to other similar communities faced with major development projects?

15. Any final comments to add?

APPENDIX 3 – VICTORIAN COUNSEL OF SOCIAL SERVICES PARTNERSHIP GUIDES 1-3

Partnership Practice Guide

Guide 1: Preparing to Partner

Guide 1 Preparing to Partner

Content

- Definition
- Principles
- Types
- Benefits
- Challenges
- Exploratory meeting

Tools

- Assessing the Need for Partnerships
- Continuum of Joint Effort

Guide 2 Commencing the Partnership

Content

- Questionnaire
- Mapping
- Communication
- Reporting
- Managing conflict

Tools

- Partnership Working Group
- Progress Report
- Terms of Reference

Guide 3 Sustaining the Partnership

Content

- Partnership lifecycles
- Support Strategies
- Evaluation

Tools

- Brief P/ship Questionnaire
- VicHealth Partnership Analysis Tool
- New York P/ship Self-Assessment Tool

Introduction

Welcome to the first Partnership Practice Guide of a series of three guides on partnering¹ designed to provide information, tools and resources to staff in the health, housing and community services sector and government departments.

The three guides are complementary to other guides and manuals available in the sector and can be read in conjunction with a) the Memorandum of Understanding 2009–12 between the Department of Human Services (DHS) and the Health, Housing and Community Sector, and b) the Collaboration and Consultation Protocol.

Who are the Practice Guides for?

The guide has been designed for any staff person or member of the partnership who has an interest in partnerships or partnering activity and is wanting an easy guide to commencing or sustaining a partnering arrangement.

1 The project was an initiative of the Human Services Partnership Implementation Committee (HSPIC) which has representatives from both sector organisations, including the Victorian Council of Social Service (VCOSS) and DHS.

The Next Guide

Guide 1: Preparing to Partner provides a description of the critical factors to consider in the preparation for partnering.

Definition of Partnership

The term Partnerships is described as two or more organisations that ...'make a commitment to work together on something that concerns both, to develop a shared sense of purpose and agenda, and to generate joint action towards agreed targets'².

In addition the commitment could include a formal agreement, for example, a memorandum of understanding, terms of reference, or partnership agreement. Finally within the health, housing and community sector, the partnership would have an ongoing service delivery focus.

It implies the sharing of decision-making, risks, power, benefits and burdens. A partnership should add value to each partner's respective services, products or situations.³ Implicit in the idea of partnership

2 Stern R & Green J (2005) 'Boundary workers and the management of frustration: a case study of two Healthy City partnerships' in Health Promotion International, 20(3): 269–276

3 Frank and Smith, 1997; Collaboration Roundtable, 2001.

Partnership Practice Guide

Guide 1: Preparing to Partner

are expectations of a degree of interdependence between the organisations involved and of a time limited or long term relationship.

Why Partner?

Working in partnership across government departments and organisations and community to achieve integrated services will contribute to improving outcomes of people experiencing disadvantage.

Partnerships are a key mechanism to achieve a more coordinated service, to address service gaps and to pool resources to meet the needs of those accessing services.

Many funding bodies now specify the forming of partnerships as a condition of funding for the above reasons. Examples include Child FIRST, Primary Care Partnerships (PCPs) and Front Door.

Types of Partnerships

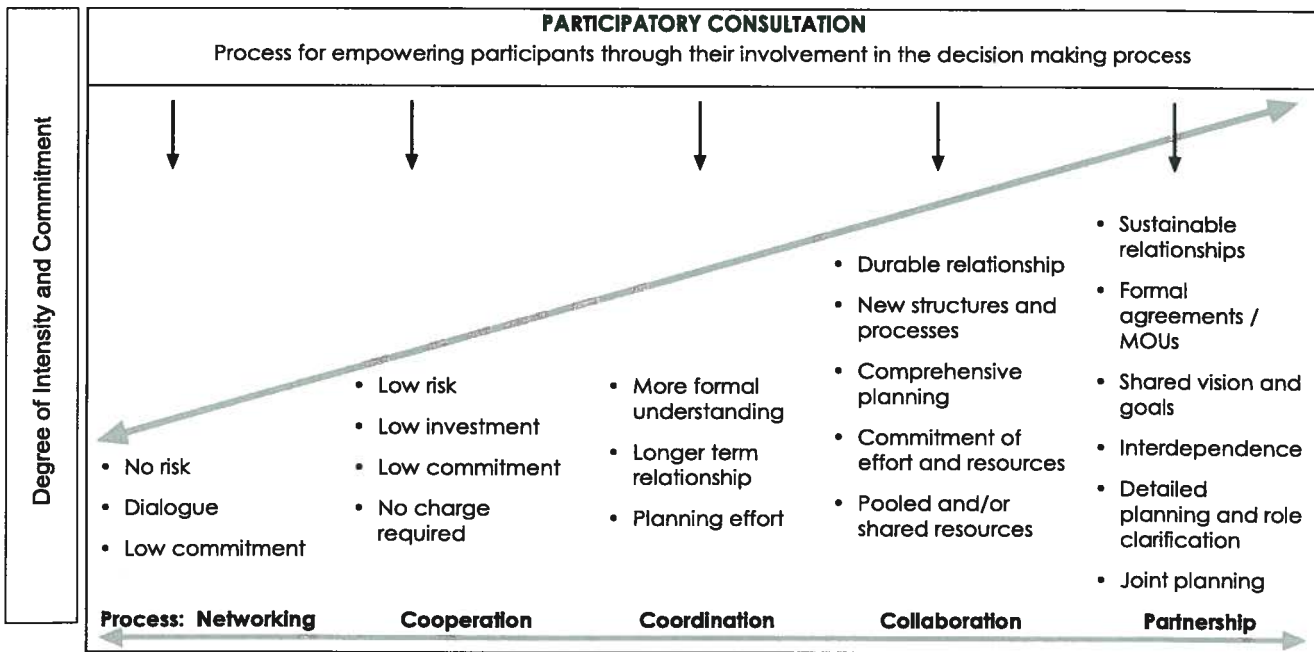
There are different forms of working together between organisations which can be represented along a continuum.

The Continuum of Joint Effort⁴ model helps to clarify the type of partnership between organisations depending on the outcomes desired.

From networking, cooperation, coordination, collaboration and finally partnership. Underpinning each of these commitments is the need for strong and effective participatory consultation with all stakeholders.

Partnership arrangements come in many forms and must be adapted to the needs and characteristics of each individual initiative and the partners involved. Different objectives will necessitate different partnership approaches. The key factor inherent in the term 'partnership' is the concept of sharing.

Continuum of Joint Effort



@ Success Works 2002

⁴ Developed by Success Works, 2002 and included in *Putting Partnerships into Practice Final Report*. Report prepared for the Department of Human Services 2004.

Benefits of Partnering

The following benefits of working in partnership with other organisations include:

- partnerships can allow for diverse thinking and values to lead to better outcomes
- partnerships provide opportunity to share a workload and resources
- partnerships build capacity of their members
- partnerships can create the environment for taking risks in developing new service models
- partnerships create the motivation for people to pull together, which in turn drives and sustains the partnership

Challenges of Partnering

The following challenges have been identified in working in partnership with other organisations:

Partnership for what?

The reasons for establishing the partnership must be clearly articulated, understood and accepted by members.

Realistic expectations and an accurate appreciation of capacities, including authorities, skills and resources of the other partner's environment is also crucial.

Trusting the other

Considerable work may be required to overcome some initial suspicions about the partnership and its purpose.

Leadership

At both an individual and organisational level, leadership is a key attribute and is required from all members of the partnership – from chair, from partners on behalf of their organisations or the group they represent, and from partners who are required to lead on particular issues⁵. To promote a sense of ownership, staff at the operational level also need to lead.

Membership of partnership

Consistency of membership from an organisational and individual level is important to maintain the connection and momentum between and across partnership members. The level of skill, knowledge and experience of members is equally important as is the role of the Chair in helping to drive the agenda.

Authority of partnership

The partnership must be able to make decisions; it must have authority; breadth of power and responsibility. The partnership must have the apparent and executive authority to ensure that partnership aims are realistic and adopted globally and within individual organisations.

Adequate resourcing of partnership

Adequate resourcing of the partnership activities is important such as administrative support (i.e. agendas, minutes and overall coordination, joint actions, initiatives, planning and evaluation). Resourcing issues should be considered from the establishment of the partnership.

Doing the Groundwork

It takes time to develop successful partnerships. Developing a trusting relationship where all partners feel that there is mutual benefit from the partnership is essential for success. This cannot be achieved in one or two meetings or where there has been a history of tension with another partner or organisation.

It requires an environment of trust, mutual respect and consensus building. Partnering moves from:

From ⁶	To
Control	Influence
'my' & 'your'	Our business
independence	interdependence
Myth of hero leaders	Shared leadership
Superficial solutions	Culture change
Changing one service	Aligning many
Focus on task	Process/attitude

⁵ Boydell, L 2001. *Partnership Framework: a model for partnerships for health*. Institute of Public Health in Ireland, Dublin

⁶ Developed by Tony Morrison *Understanding & Leading Inter-agency Partnerships Seminar* 29 Jan 2009 sponsored by Berry Street Victoria

Partnership Practice Guide

Guide 1: Preparing to Partner

Below is a step by step approach to commencing the partnership:

a) Preparation within an Organisation

This is a critical first step which identified a person(s) in the organisation who will manage the partnership. The person's skill and authority (to make decisions) is of prime importance in addition to holding an understanding of governing structures and support mechanisms including role clarity.

Key partnership skills include communication, judgement, discretion, openness, integrity, loyalty, leadership, negotiation and an understanding of different partnership roles.

This step should identify how much time the person can commit (weekly, fortnightly, monthly) to the partnership. It also involves the identification of resources available (financial and non-financial) to commit to the partnership.

b) Conducting an Exploratory Meeting

Preliminary discussions should be held with potential partners including funding body(ies) to discuss relevant issues prior to making a decision that a partnership is desirable. It is important to ensure that each organisation is ready, willing and able to partner. Time spent up front in establishing a firm foundation will pay off in the long run by greatly increasing the probability of success.

The kind of support required from each organisation and the action to be taken to gain and maintain the support required should be identified up front. The benefits to each organisation of supporting the partnership should also be considered. Organisations will be more supportive if there are clear benefits to them.

At this initial meeting, the agenda might include the following items:

- Understanding each others organisation and its possible contribution to the partnership
- Possible governance structures that might suit the partnership (or is it specified in the funding agreement?)
- Resourcing – what contribution is possible (and funded?) from each organisation?
- Membership – who are the best people from which organisation for this partnership and who is best to chair?
- What protocols and communication processes will we need to make this work (Memorandum of Understanding or Partnership Agreement)?

c) Assessing the Need for Partnerships⁷

provides four key questions to consider, understand and address about partnerships and partnership building in order to make the best choices about developing these alliances:

1. Should we partner?

Partnerships should be strategic alliances, with risks and rewards weighed. Partnering is one strategic option for getting something done.

Decision Issues

Can we do it ourselves, or do we need to develop this capacity? How much control do we need over the process and output? What would partnering enable us to accomplish over and above the alternatives?

Learnings

Many partnerships are hastily entered.

Partnering often sacrifices control for the sake of unique gains.

2. What overall purposes would this partnership serve?

Partnerships may produce something special or produce it more effectively through joint work. They also often provide the legitimacy or political support that complex problems require.

Decision Issues

Who are the key stakeholders, and what are their expectations? Who has the credibility and capacity needed to act on this issue or problem?

Are we ready to hitch our *reputation* to theirs? Do we *trust* their motives as well as their competence?

How will *other* stakeholders respond?

Learnings

Taking a “multilateral” approach is often crucial for complex problems. An ineffective partnership, however, may make it harder for the individual players to “deliver the goods” that stakeholders expect.

3. How should we define success?

Too many efforts forget to evaluate the multiple dimensions of performance in partnership work. Partnerships often face great expectations and confusing demands.

Decision Issues

What *outcome* (change in the “state of affairs”) do we want to create together? What measurable *outputs* (of our work) will those outcomes require? What kinds of *knowledge* and what *operational processes* will help us produce the outputs?

Learnings

Not all successful relationship building leads to improved joint output, which requires learning, risk taking, and new behaviour. Partners may also ignore the external factors that affect outcomes, creating a relational success and an outcome failure.

4. How partnered should we be?

Partnership arrangements can operate at various levels of depth or “integration” in terms of the partners’ activities and resources.

Decision Issues

Based on our capacity and aims, do we envision “light” cooperation arrangements or deeper, blended activities and pooled resources? Or something in between?

Learnings

Partnerships struggle when participants have different, and often unexpressed, assumptions about the right *degree* of partnership.

⁷ Adapted with permission from DHS Draft Building Rural Health Partnerships: Toolkit for Success P13

Partnership Practice Guide

Guide 1: Preparing to Partner

d) Structuring the Partnership

The most appropriate type of partnership structure will vary according to the nature of the partnership, pre-existing coordination arrangements and prior history of working together and other context and operating factors.

The structure needs to suit the purpose they are to achieve. Simplicity is the most powerful criterion. Partnerships require a structure through which the participating organisations are able to communicate and negotiate agreements. This might include working groups to work on particular issues.

Partnerships work best when supported by clear structures and formal written agreements developed collaboratively, that clearly set out partnership purpose, common goals, joint objectives, roles and responsibilities, performance expectations, review mechanisms and an exit strategy.

It requires a clear governance structure that states how the partnership is controlled, and the systems and practices in place to manage this partnership. Members benefit from agreements on how they will communicate, protocols to guide their work, and a means for dispute resolution when things go wrong.

Memorandum of Understanding (MoU)

An MoU describes the goals, governance structures and management arrangements of a partnership. It is not a legal document and is distinct from a funding and service agreement.

An MoU might include:

- Context and Rationale
 - Mission or Purpose Statement
- Values & Principles
- Governance structure and authority
- Goals and Objectives of the Partnership – what is to be achieved in terms of the relationship
- Partnership Coordination
 - Membership
 - Structure
 - Roles and responsibilities of all partnering members, including Chair
 - Meeting schedule
- Signatures to the MoU

An MoU might also include protocols for working arrangements such as:

- Communication, information sharing and consultation processes
 - Meeting – purposes, agenda, minutes and processes
 - Roles and Responsibilities
 - Resourcing meetings
 - File management
 - Accountability mechanisms – performance monitoring and reporting to the Partnership
 - Complaints handling

- Problem or dispute resolution processes
- External stakeholder or network engagement across geographic areas
- Budget or resources management and allocation
- Partnership performance – monitoring, review and evaluating the partnership

Terms of Reference (ToR)

The ToR document describes operational working arrangements for the partnership. These are generally drafted prior to the first meeting and agreed for discussion and/or ratified at the meeting. These might include:

- Purpose
- Membership
- Partnership coordination and management arrangements
- Service operations – planning; day to day operations – who does what; when and how; communication and information sharing
- External stakeholder or network engagement – will the membership expand, who needs to be at the table?
- Meeting schedule
- Dispute resolution processes
- Administration and other systems support
- Review and Evaluation

d) Partnership Review

Consider how the partnership will be monitored, reviewed and evaluated. What should be in place at the beginning to ensure data and information is recorded for measuring success?

This will be discussed in more detail in Guide 3 Sustaining the Partnership.

Case Study

A State Government department is funding a number of organisations in a geographical area to work together to deliver an integrated service response.

The department wants to build a comprehensive and integrated service platform by streamlining a program so that recipients of the service receive a more accessible and targeted service. This includes a common referral process and pathway through the various service options.

The department has invited five organisations to be involved, two of whom have a history of tension with the other. Three of the organisations have met at networking sessions but have never worked together in any integrated way.

The first meeting has been arranged by the department as an exploratory get to know meeting and to more fully understand the government's intent and how the organisations might contribute. Resourcing is agreed also.

The first meeting will need to clarify a number of issues, for example, the nature of the departmental led partnership, who is at the table and what is their organisations culture, history and values; what role will each organisation play; how will members communicate between each other and back to their organisation; how to resolve issues and disputes, and finally resourcing.

The discussion around the above issues will assist members to understand how the partnership might work. In addition, tabling the four strategic questions previously discussed will help members build the partnership.

Partnership Practice Guide

Guide 1: Preparing to Partner

Guide 2: Commencing the Partnership

This guide provides suggestions and tools in the early stages of the partnership. It covers systems, communication and workflow processes as a vehicle for control between members in the partnership to promote consistency and continuing commitment.

Further Resources

Boydell, L 2001, 'Partnership Framework: a model for partnerships for health'. *Institute of Public Health in Ireland, Dublin*

Boydell, L 2007, 'Partnerships: A Literature Review, *Institute of Public Health in Ireland, Dublin* Ireland ISBN 978-0-9555912-3-5

Carson, E. & Kerr, L 2006, 'Evaluating government/third sector partnerships in Australia', *Governments and Communities in Partnership: From Theory to Practice, Conference hosted by Centre for Public Policy, University Of Melbourne Australia. September 2006.*

Pope, J & Jolly, P 2008, Working in Partnership: Practical advice for running effective partnerships, *Department of Planning and Community Development. Melbourne, Australia.*

Acronyms

The following acronyms are used in this Guide

CSO	Community Services Organisation
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Links

Partnership Forums and HSPIC

<http://www.dhs.vic.gov.au/operations/regional-operations-performance/partnership-unit/partnership-forums-and-hspic>

VCOSS

<http://www.vcooss.org.au/>

Partnership Practice Guide

Guide 2: Commencing the Partnership

Guide 1 Preparing to Partner

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- Definition
- Principles
- Types
- Benefits
- Challenges
- Exploratory meeting

Tools

- Assessing the Need for Partnerships
- Continuum of Joint Effort

Guide 2 Commencing the Partnership

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- Questionnaire
- Mapping
- Communication
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- Managing conflict

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- Partnership Working Group
- Progress Report
- Terms of Reference

Guide 3 Sustaining the Partnership

Content

- Partnership lifecycles
- Support Strategies
- Evaluation

Tools

- Brief P/ship Questionnaire
- VicHealth Partnership Analysis Tool
- New York P/ship Self-Assessment Tool

Introduction

Welcome to the second Partnership Practice Guide of a series of three guides on partnering¹ designed to provide information, tools and resources to staff in the health, housing and community services sector and government departments.

The three guides are complementary to other guides and manuals available in the sector and can be read in conjunction with a) the Memorandum of Understanding 2009–12 between the Department of Human Services (DHS) and the Health, Housing and Community Sector, and b) the Collaboration and Consultation Protocol.

Who are the Practice Guides for?

The guide has been designed for any staff person or member of the partnership who has an interest in partnerships or partnering activity and is wanting an easy guide to commencing or sustaining a partnering arrangement.

¹ The project was an initiative of the Human Services Partnership Implementation Committee (HSPIC) which has representatives from both sector organisations, including the Victorian Council of Social Service (VCOSS) and DHS.

The Next Guide

Guide 2: Commencing the Partnership provides suggestions and tools in the early stages of the partnership, including setting up systems and workflow processes.

Preparing to Partner

In Guide 1 – Preparing to Partner, an exploratory meeting is suggested between potential partners and the funding body representative to confirm joint activity, membership and structure of the partnership.

This involves setting shared direction and the potential tasks, roles, responsibilities, actions required, and to develop inter-organisational links.

Workplans are developed and desired results and indicators specified. Decision making procedures can be developed and reviewed to allow for meaningful flexibility and refinement. In essence, how it will work together. Below is a partnership Questionnaire that will guide this discussion.

Partnership Practice Guide

Guide 2: Commencing the Partnership

Partnership Questionnaire

The purpose of the Partnership Questionnaire² is to guide questions for the newly formed partnership in which to specify and plan key activities over the next 12 months. It is also designed to ensure that a process for monitoring and reviewing progress against timelines and tasks is considered.

Below is a checklist of questions to guide the discussions.

Q 1 – Are all members signed up?

Q 2 – Are Governance and shared management arrangements clear?

Q 3 – Are the Executive and practitioner (operational level) managers linked in?

Q 4 – Is there common values and common language?

Q 5 – How clear are the policies and roles and accountabilities?

Q 6 – Do the members have 'authority' to make decisions?

Q 7 – How are decisions made?

Q 8 – Are there processes for members to report back in their organisation?

Q 9 – How good are communications between the partner agencies?

Q 10 – Does the partnership access training?

Effective leadership or governance is a key success factor in developing a shared vision or purpose for collective action, establishing direction and promoting collaboration and consensus building principles.

Mapping the Partnerships

One of the challenges often presented to newly formed partnerships is the breadth and span of its influence and the extent of its representation. Mapping will assist in clarifying the organisations involved, their authority, key alliances and other interested organisations or individuals.

Mapping will help:

- Identify organisations and other key stakeholders and any strategic alliances that need to be involved
- Identify current service system or pathways through this partnership using the end user (client) perspective
- Analyse the key relationships and how they currently operate
- Assess current and potential value of each opportunity and relationship

How to map the partnership

It is helpful to draw a partnership map showing the key organisations/ services involved strategic alliances to other service providers and funding bodies, and other stakeholders.

Map out the current service system or pathway through the program of which the partnership is representing.

Analyse the key relationships and how they work currently.

Commencing the Workflow

The physical location, access to equipment and resources will influence the effectiveness of the partnership. Similarly who and how the work will be undertaken. To a degree this will have been discussed prior to the commencement of the partnership but the actual schedule of meetings, who is present, work tasks and allocation requires further discussion and confirmation.

Defining roles

One of the key components of a partnering arrangement is a clear identification, discussion and clarification of:

- Roles
- Responsibilities
- Working arrangements or protocols – defining consistent approaches to who does what and how

² Adapted from Morrison, T 'Towards Integration Checklist' from workshop reading material titled 'Understanding & Leading Inter-agency Partnerships' 290109 The Centre Ivanhoe Victoria

Below is a template example for recording this.

Roles	Responsibilities	Working Arrangements (Who does what and how?)

Development of a strategic plan and workplan

The partnership may already have key goals identified (specified through the funding arrangement, for example data collection for service usage across a cohort or catchment) over a one, two or three year period. The development of an annual workplan can then specify the detail and contextualize the goals for local delivery.

The doing and the setting of tasks

Having established a workable governance structure, it should be clear how the work will be generated and who will undertake it, and finally how it will be reported.

The relationship between the governing body and any operational group(s) should be documented and known to the members of the partnership.

Structures that work best generally have a strategic arm, an operational arm (and in some situations, working groups). The latter are usually temporary, formed specifically to manage and be responsible for a particular task or activity or program.

In determining if the partnership would benefit from a working group, a number of questions can be asked.

Partnership Working Group

A Checklist to determine the need for and role of a Working Group is listed below:

Task	✓
Purpose and intended outcomes of group	
Powers of group (advisory or decision making)	
Membership	
Responsibilities and commitments of members	
Role of chair	
Process for recording views and making recommendations (for advisory groups)	
Process for making and endorsing decisions (for decision making groups)	
Frequency and duration of meetings	
Responsibility for executive support	
Confidentiality of meetings and documents	
Process for review of terms of reference and dispute resolution	

Partnership Practice Guide

Guide 2: Commencing the Partnership

General questions to consider for working groups:

1. How many members are required and what type of skills do they need to have?
2. Will the member be expected to represent their organisation or community?
3. Which population groups should be represented?
4. What will be their time commitment? (How many hours per month for how long?)
5. How will member travel arrangements and expenses be handled?
6. Where, when, and how often will they meet?
7. Will the meetings be open or closed?
8. What rules of order will be followed?
9. What will the role of members be?
10. How will the group sustain itself?
11. How will the effectiveness of the groups be evaluated?

Terms of Reference

Those directly responsible for delivering the outputs/outcomes on behalf of the partnership will rely on the governing body for guidance and support to achieve these.

It may be appropriate to develop Terms of Reference to describe the purpose and structure of the working group.

Name of (Working Group)

Terms of Reference

1. Purpose:

The (name of Partnership Steering Group/Committee) will work towards (overarching statement about intent)

The (name of Partnership Steering Group/Committee) sets out to achieve (what outcomes)

2. Objectives:

List 2 or 3 objectives – The (name of Steering Group/Committee) will provide (advice, guidance...)

3. Membership:

The (name of Steering Group/Committee) comprises (name who) nominated by the (name who).

Name who will take minutes and/or coordinate meetings

The role of Chair is (name person and title).

All recommendations passed by (name of Steering Group/Committee) are to be signed off by (name body).

Location of each meeting will be determined (how and where?)

4. (Name of Steering Group/Committee) Procedures:

Process

Members will commit themselves to functioning in an environment that creates and extends opportunities for:

(Identify 2 or 3 adjectives to describe how you want the committee to operate)

This culture will evolve to the extent those members:

- contributions are given and received in trust
- speak openly on behalf of constituents, without fear or favour
- act as information conduits between (who and who)

The (name of Steering Group/Committee) will seek to:

- Support, engage, canvass and represent (which constituents)
- Disseminate information to (who) in an efficient and timely manner
- Ensure two way consultation and communication between (who and who).

Minutes and Agendas

Minutes will be taken and distributed by (name individual or group). Agendas will be compiled in consultation with (who and who) in consultation with the Chair.

Agendas and minutes will be distributed within one week prior to the meeting. Minutes will be distributed within one week of the meeting.

Absences

If a member is absent for three consecutive meetings without notice or justifiable reason, the committee will review their membership.

Sub committees

The (name of Steering Group/Committee) may establish ad hoc sub committees as required. Its membership may be extended (under what conditions?).

The (name of Steering Group/Committee) when establishing sub committees will:

- determine membership
- establish aims
- clearly define a process for decision making

Meetings

The (name of Steering Group/Committee) will meet (how often – monthly; bi monthly) for (two hours or more, specify) at a regular time. Subgroup meetings will occur outside of these times. The scheduled meeting times are (list dates, times and venue).

Resources

List other resources

Partnership Practice Guide

Guide 2: Commencing the Partnership

Case Study

A partnership involving 6 agencies has been operating for 3 months. It has a governance structure in which all 6 agencies have one representative at the executive level which sets the strategic direction, and then a member each at the operational group. This latter group is responsible for the implementation of key activities.

A member from the operational group attends the executive group and discusses progress and issues at the implementation stage to the executive and back to the operations group.

The executive meetings are scheduled monthly and each executive member has one vote and decisions are made through consensus. These processes are documented in the Communication Plan.

The executive group endorse courses of action, recommends action or seeks more information from the operations group member attending.

The Communication Plan identifies how the partnerships will communicate progress and receive input from the sector.

The governance structure works well for all partnership members and through this structure are able to deliver key outcomes. A good relationship is enjoyed by all.

Communication

Communication is vital to the success of a partnership. Communication efforts should be initiated at the commencement of the partnership. Identifying the target audiences, crafting clear messages, and effectively communicating these messages to the target audiences will increase the likelihood of initiatives and their outcomes being accepted and used.

A good communication flow keeps people informed about what is going on. It promotes trust and a more friendly and satisfying working relationship; creates a more productive environment; helps to avoid conflict and helps partners achieve their objectives.

Hints

- Establish a communication plan and process (good communication among partners does not happen unless there is a plan in place and a process has been identified to support the communication)
- Identify who is responsible for communication between the partners
- Identify what information needs to be shared and with whom

- Select the best methods for sharing information. For example, when is written communication to be used and in what format, or electronic methods or face-to-face communication.
- Document results of meetings – what has been agreed to, what decisions are required and who will action them?

Reporting Options

Regular reports of progress help to maintain support and enthusiasm for the partnership and its activities. Brief, structured reports work better than extensive narrative. Reporting works best when it is linked to the annual work plan.

Reports are also a means of communicating with participating organisations and those whose support is required. They can be used to promote successes and to build and maintain support. The work plans should be the basis for official progress reports. Focus particularly on reporting against indicators and timeframes and milestones.

A standard format Progress Report is represented below.

Key Result Area			
Outcome	Indicator / Timeframe	Expected achievement this month	Actual achievement this month
Comments/Highlights			

Anticipating and Managing Conflict

Successful partnerships recognise that conflict is a natural part of partnering with diverse groups, and are able to anticipate and use conflict constructively.

Early discussion and the documentation of a process for resolving differences and conflictual situations is essential at this stage.

Hints

- Create a sense of interdependency among partnership members
- Create a sense among partners of being well informed by regularly providing updated information to them
- Work continuously to maintain a high degree of trust among partners
- Create a process of decision-making that is perceived by all as fair and open

Guide 3: Sustaining the Partnership

This guide identifies the essential criteria for maintaining a successful partnership including understanding partnership lifecycle stages and strategies, monitoring and review techniques, and finally evaluation options to check the health of the partnership.

Further Resources

Boydell, L 2001, 'Partnership Framework: a model for partnerships for health'. *Institute of Public Health in Ireland, Dublin*

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Partnership Practice Guide

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¹ The project was an initiative of the Human Services Partnership Implementation Committee (HSPIC) which has representatives from both sector organisations, including the Victorian Council of Social Service (VCSS) and DHS.

This Guide

Guide 3: Sustaining the Partnership provides hints on how to keep the partnership alive, troubleshooting strategies and finally evaluation techniques to measure success.

Sustaining the Partnership

The success of any partnership depends on sustaining the process, particularly as leadership, administrations, and policy makers change.

Initial commitment and energy of partners commences the partnership, however the following components are the key to sustaining partnerships over a long period or until they conclude naturally through meeting their goal (time limited):

- creating a sense of interdependence
- recognising and rewarding members
- combining planning with action, and
- creating a learning partnership

Partnership Practice Guide

Guide 3: Sustaining the Partnership

Case Study

A partnership comprising 10 organisations ranging from small to large in size was established six months ago. One of the larger organisations is the auspice for the funding and is responsible for reporting the overall partnership outcomes on a regular basis to the funding body.

The governance structure has 3 levels – strategic, operational and working groups.

A senior member of the auspice organisation chairs the Strategic Group for 12 months and has committed resources for administrative support (for which they have received funding).

The partnership has experienced some initial problems resulting in:

- its failure to achieve deliverables and accountability requirements on time
- disengagement of partnership members with low meeting attendance and
- difficulty in managing and expending the budget.

The Chair struggled with the time commitment required to sustain the momentum due to her own organisation increased workload and agended an item to review progress. Members were contacted directly and asked to attend this meeting to contribute to a review and to identify strategies to invigorate the partnership.

In the above case study, a time issue has been identified within 6 months of its commencement. Partnerships go through stages, often referred to as lifecycles and the partnership needs to have an understanding of this process and a means to deal with such issues.

Understanding Partnership Lifecycles

Partnerships go through different stages of development and growth at different times depending on where the partnership is in its life cycle. The stages are adapted from Tuckmans model². Understanding the challenges at key points will help the members identify appropriate strategies to implement in order to sustain the partnership.

Five Stages of Partnerships

The five common life-cycle stages of organisational behaviour, in this instance the partnership are as follows:

1. Forming

The partnership is a group of individuals coming together. This newly formed partnership is characterised by members who are extremely polite or silent with minimum initiative or commitment shown.

2. Storming

Part of the process of being able to work together may involve working through conflicts and differences, either by raising and resolving them or by agreeing to move on and around them. Some issues may be fundamental to the partnership, for example, resourcing, that must be dealt

² Tuckman, B & Jensen, M 1977, *Group & Organization Management*, Vol. 2, No. 4, 419–427 1977

with. This stage is characterised by strong opinions, vying for position or authority, adjusting to meeting process and resource issues.

3. Norming

The partnership will usually develop a set of common understandings and operating procedures that will enable productive activity to commence.

4. Performing

This is a mature partnership and the optimum point in life cycle... goals are achieved, there is balance of control and flexibility, and it has refined its core business. The partnership still has room to grow, change is embraced.

A mature partnership would have strong networks in the community and across government and is well resourced. It may be well connected and seek out opportunities to input into strengthening its partnership, forging new partnerships and impacting on broader policy. This stage requires robust processes and innovation to keep the partnership alive.

5. Adjourning

The partnership members move on once the work of the partnership has been completed. For ongoing partnerships this stage resembles 'decline' where members lose interest and leave, policies and practices may need revamping and the partnership withers.

These stages are not distinct and often merge into each other. The duration of each stage is less precise, and partnerships can regenerate (expand) or go through several rebirths (member changes; new growth funds etc).

Strategies to Support and Sustain the Partnership

a) Servicing the partnership

A competent, well-supported partnership is essential to its success. It is important that the roles, responsibilities and expectations of members are clearly identified and agreed. In addition, the level of administrative support and who will provide the funds will need to be agreed.

Where there are specific skills or information the partnership lacks, appropriate training or briefings may be required or specialist expertise located. This might include any special resources the partnership requires and how these will be provided.

b) Ongoing monitoring

Ongoing monitoring and shared reflection of how the partnership is working is critical to strengthening and sustaining relationships and achieving effective outcomes.

c) Regular reporting of progress

Regular progress reporting will help maintain support and enthusiasm for the partnership and its activities.

Brief, structured reports linked to the Strategic Plan and annual Action Plan enable members to monitor progress and to take prompt action where required.

Adopting a project methodology to plan for and report against indicators, timeframes and milestones, will enable tracking of any deviations and implementing corrective action.

Reports are also a means of communicating with participating organisations and those whose support is required. They can be used to promote successes and to build and maintain support.

Partnership fails because:

1. Rationale behind the establishment of the partnership was not clearly articulated, understood or accepted by stakeholders
2. Underestimating the time to establish a partnership – developing a trusting relationship of reciprocity (mutual benefit) takes time and effort
3. Partners do not recognise their interdependence and the value of partnering
4. Lack of clarity of purpose or failing to recognise potential participation constraints

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5. Lack of authority – partnership does not have authority to make decisions nor key responsibilities
6. Failure to lead – partnership suffers from lack of shared vision or purpose or direction
7. Inadequate resourcing of partnership activities

Strategies for a Failing Partnership

Every partnership will go through lifecycles. Some partnerships may not survive strategies to revamp it; some partnerships choose to struggle on; finally some partnerships acknowledge their difficulties and seek outside support. Options may include:

1. Terminate or discontinue the partnership
2. Reorganize the group from a partnership to an 'arrangement'

Both options require careful navigation to acknowledge the achievements of the partnership and plan for alternate arrangements. In some instances, closing the formal partnership can be a positive measure of success. It also may have achieved its purpose and have no further need to continue.

Action required to terminate the partnership:

- Identify the partnerships major accomplishments and acknowledge those people and organisations who have contributed
- Determine how to inform people – both inside and outside the partnership of the decision to dissolve
- Document the partnerships history and the lessons which can be drawn from its operations
- Recommend an appropriate alternative to the current partnership
- Select a time, place and event to celebrate what has been accomplished

Evaluating the Partnership

Evaluations may be conducted for a variety of reasons including assessing whether the methodology is working; assessing the benefits of individuals and organisations; justifying expenditure of resources and confirming and promoting success.

Informal Tools

There are a number of tools available to evaluate a partnership.

Brief questionnaire

In its simplest form, a partnership evaluation could address the following questions:

1. Why did we decide to work as partners? Are the reasons still valid?
2. Did we achieve what we set out to do?
3. What else has happened as a result of our working together?
4. What have been the impacts on our organisations and our clients/ community?
5. Were the achievements worth the expenditure of time, effort and other resources?
6. Do we need to still work together to achieve these outcomes?
7. What have we learnt?
8. What revisions need to be made to the partnership and how will we use the evaluation findings?³

The discussion method provides the opportunity for members to reflect on the partnership they have established and on ways to strengthen it.

³ Social Compass, La Trobe University, Melbourne, Partnership Tools: Tool 6: Evaluating the Partnership and its Program, <http://www.socialcompass.com/index.cfm/Partneringtoolkit/>

Evaluation Criteria and Evidence Base

Evaluating the Collaborative Process⁴

Evaluation criteria	Evidence
<p>Participant assessment of the collaborative process</p> <p>Changes in <i>attitudes and knowledge</i> that support development of a partnership and sustain it over time including:</p> <ul style="list-style-type: none"> • indications of trust; • a familiarity with the partner's identity, aims and capacity; and • the perception that the relationship is worth continued investment. <p>Can such attitudes be detected? Are they gaining or losing strength over time?</p>	<ul style="list-style-type: none"> • Anecdotal evidence (of satisfaction or dissatisfaction, increased trust, etc) • Formal assessment of participant satisfaction via surveys, focus group discussions, etc. • Attendance rate at meetings.
<p>Changes in how partners act</p>	<ul style="list-style-type: none"> • tangible <i>actions</i> that reflect progress on commitments that partners make to each or to the larger community • resources invested to carry out the partners' joint work.
<p>Partnership accomplishments</p>	<ul style="list-style-type: none"> • <i>outputs</i> that indicate what partners' joint activities are actually producing that might have tangible value, such as jointly delivered health care.
<p>Improvements in service which could not have been achieved without collaboration</p> <p>Improvements in efficiency which could not have been achieved without collaboration</p>	<ul style="list-style-type: none"> • Partnership outcomes (distinguish improvements attributable to collaboration – eg. improved health of families as a result of partnership outputs) • Comparison with outcomes without collaboration • Identify difficulties minimised or removed through collaboration. • Project outcomes (distinguish improvements attributable to collaboration) • Comparison with costs and efficiency without collaboration • Cost savings attributable to collaboration • Changes to organisational systems (distinguish changes attributable to collaboration) and demonstrable benefits of these

4 P 45 Building Rural Health Partnerships: Toolkit for Success, Department of Human Services Victoria Draft 2008

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Evaluating the Collaborative Process⁴ (continued)

Evaluation criteria	Evidence
Collaboration model chosen was the simplest, cheapest and least disruptive needed to achieve the outcomes	Indicative comparison with other possible models.
All relevant parties were involved	Identification of any relevant organisations and stakeholders included late or found to have been overlooked.
Cost-benefit of collaboration	Additional costs attributable to collaboration, compared to benefits and savings achieved.
Spin off benefits attributable to collaboration	<ul style="list-style-type: none">• Other initiatives resulting from relationships made through this partnership• Improved community perceptions of organisations• Skills gained by organisations• Improved morale and job satisfaction for participating staff

Formal Tools

Two other more common tools are listed in Templates 1 and 2:

Template 1: VicHealth Partnership Analysis Tool (and example)

This tool is designed to reflect on the partnerships and ways to strengthen it through engaging in discussion, and

Template 2: New York Partnership Self-Assessment Tool

This tool was designed to help partnerships understand how collaboration works and what it means to create a successful collaborative process; assess how well their collaborative process is working, and identify specific areas they can focus on to make their collaborative process work better.

Further Resources

Boydell, L 2001, 'Partnership Framework: a model for partnerships for health'. *Institute of Public Health in Ireland, Dublin*

Boydell, L 2007, 'Partnerships: A Literature Review, *Institute of Public Health in Ireland, Dublin* Ireland ISBN 978-0-9555912-3-5

Carson, E. & Kerr, L 2006, 'Evaluating government/third sector partnerships in Australia', *Governments and Communities in Partnership: From Theory to Practice, Conference hosted by Centre for Public Policy, University Of Melbourne Australia. September 2006.*

Tuckman, B & Jensen, M 1977, *Group & Organization Management*, Vol. 2, No. 4, 419–427 1977

Pope, J & Jolly, P 2008, Working in Partnership: Practical advice for running effective partnerships, *Department of Planning and Community Development. Melbourne, Australia.*

Acronyms

The following acronyms are used in this Guide

CSO	Community Services Organisation
DHS	Department of Human Services
HSPIC	Human Services Partnership Implementation Committee
MoU	Memorandum of Understanding
TOU	Terms of Reference
VCOSS	Victorian Council of Social Service

Links

Partnership Forums and HSPIC

<http://www.dhs.vic.gov.au/operations/regional-operations-performance/partnership-unit/partnership-forums-and-hspic>

VCOSS

<http://www.vcooss.org.au/>

Social Compass

<http://www.socialcompass.com/index.cfm/Partneringtoolkit/>

VICHEALTH

<http://www.vichealth.vic.gov.au/en/Resource-Centre/Publications-and-Resources/Mental-health-and-wellbeing/Mental-health-promotion/Partnerships-Analysis-Tool.aspx>

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Template 1: VicHealth Partnership Analysis Tool

This tool is designed to facilitate partnerships across sectors by:

- assisting organisations to develop a clearer understanding of the range of purposes of collaborations
- reflecting on the partnerships that have been established
- focusing on ways to strengthen new and existing partnerships by engaging in discussion about issues and ways forward

VicHealth Partnership Analysis Tool

Rate your level of agreement with each of the statements below, with 0 indicating strong disagreement and 4 indicating a strong agreement.

	0 Strongly disagree	1 Disagree	2 Not sure	3 Agree	4 Strongly agree
1. Determining the need for the relationship					
There is a perceived need for the relationship in terms of areas of common interest and complementary capacity.					
There is a clear goal for the relationship.					
There is a shared understanding of, and commitment to, this goal among all potential partners.					
The partners are willing to share some of their ideas, resources, influence and power to fulfil the goal.					
The perceived benefits of the relationship outweigh the perceived costs.					
TOTAL					
2. Choosing Partners					
The partners share common ideologies, interests and approaches.					
The partners see their core business as partially interdependent.					
There is a history of good relations between the partners.					
The relationship brings added prestige to the partners individually as well as collectively.					
There is enough variety among members to have a comprehensive understanding of the issues being addressed.					
TOTAL					

0 Strongly disagree	1 Disagree	2 Not sure	3 Agree	4 Strongly agree
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3. Making sure relationships work

The managers in each organisation support the relationship.					
Partners have the necessary skills for collaborative action.					
There are strategies to enhance the skills of the relationship through increasing the membership or workforce development.					
The roles, responsibilities and expectations of partners are clearly defined and understood by all other partners.					
The administrative, communication and decision-making structure of the relationship is as simple as possible.					
TOTAL					

4. Planning

All partners are involved in planning and setting priorities.					
Partners have the task of communicating and promoting the coalition in their own organisations.					
Some staff have roles that cross the traditional boundaries that exist between members.					
The lines of communication, roles and expectations of partners are clear.					
There is a participatory decision-making system that is accountable, responsive and inclusive.					
TOTAL					

5. Implementing

Processes that are common across members such as referral protocols, service standards, data collection and reporting mechanisms have been standardised.					
There is an investment in the relationship of time, personnel, materials or facilities.					
Management rewards reciprocity between organisations.					
The action is adding value (rather than duplicating services) for the community, clients or the members involved in the relationship.					
There are regular opportunities for informal and voluntary contact between members of the relationship.					
TOTAL					

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	0 Strongly disagree	1 Disagree	2 Not sure	3 Agree	4 Strongly agree
6. Minimising the barriers to relationships					
Differences in organisational priorities, goals and tasks have been addressed.					
There is a core group of skilled and committed staff that has continued over the life of the relationship.					
There are formal structures for sharing information and resolving demarcation disputes.					
There are informal ways of achieving this.					
There are strategies to ensure alternative views are expressed within the relationship.					
TOTAL					
7. Reflecting on and continuing the relationship					
There are processes for recognising and celebrating collective achievements and/or individual contributions.					
The relationship can demonstrate or document the outcomes of its collective work.					
There is a clear need and commitment to continuing the collaboration in the medium term.					
There are resources available from either internal or external sources to continue the relationship.					
There is a way of reviewing the range of partners and bringing in new members or removing some.					
TOTAL					

Aggregate Score TOTAL

	0 Strongly disagree	1 Disagree	2 Not sure	3 Agree	4 Strongly agree
Determining the need for a relationship					
Choosing partners					
Making sure relationships work					
Planning					
Implementing					
Minimising the barriers to relationships					
Reflecting on and continuing the relationship					
TOTAL					

Checklist Score

0–49 The whole idea of a partnership should be rigorously questioned.

50–91 The partnership is moving in the right direction but it will need more attention if it is going to be really successful.

92–140 A partnership based on genuine collaboration has been established. The challenge is to maintain its impetus and build on the current success.

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Example

Partnership Analysis Tool Results

A total of 7 tools were completed for 7 members of the partnership. Below are the results:

Item	Average score (possible total 20)
1. Determining the need for the relationship	14.1
2. Choosing partners	12
3. Making sure relationships work	12.1
4. Planning	10.5
5. Implementing	10.6
6. Minimising the barriers to relationships	10.2
7. Reflecting on and continuing the relationship	11.1
Overall totals	108

The total average score of **108** from the VicHealth Partnership Analysis Tool places the overall perception of the partnership assessed through this process in the highest of three categories with the following description:

92–140: A Partnership based on genuine collaboration has been established. The challenge is to maintain its impetus and build on the current success.

Other categories for results are:

50–91: The partnership is moving in the right direction but it will need more attention if it is really going to be successful.

0–49: The whole idea of a partnership should be rigorously questioned.

Template 2: New York Partnership Self-Assessment Tool

The *Partnership Self-Assessment Tool* was designed to help partnerships:

- Understand how collaboration works and what it means to create a successful collaborative process;
- Assess how well their collaborative process is working;
- Identify specific areas they can focus on to make their collaborative process work better.

The Tool measures a key indicator of a successful collaborative process – the partnership's level of synergy. The Tool also provides information that helps partnerships take action to improve the collaborative process.

It identifies the partnership's strengths and weaknesses in areas that are known to be related to synergy – leadership, efficiency, administration and management, and sufficiency of resources. It also measures partners' perspectives about the partnership's decision-making process, the benefits and drawbacks they experience as a result of participating in the partnership, and their overall satisfaction with the partnership.

Partnership Self Assessment Tool

Questionnaire

The questionnaire focuses on a number of categories requiring one of 5 answers ranging from extremely well to not well at all (or slight variations on this 5 scale, e.g. All of what it needs to don't know)

The categories are as follows:

Synergy

Please think about the people and organizations that are participants in your partnership.

- a. By working together, how well are these partners able to identify new and creative ways to solve problems?
- b. By working together, how well are these partners able to include the views and priorities of the people affected by the partnership's work?
- c. By working together, how well are these partners able to develop goals that are widely understood and supported among partners?
- d. By working together, how well are these partners able to identify how different services and programs in the community relate to the problems the partnership is trying to address?
- e. By working together, how well are these partners able to respond to the needs and problems of the community?
- f. By working together, how well are these partners able to implement strategies that are most likely to work in the community?
- g. By working together, how well are these partners able to obtain support from individuals and organizations in the community that can either block the partnership's plans or help move them forward?
- h. By working together, how well are these partners able to carry out comprehensive activities that connect multiple services, programs, or systems?
- i. By working together, how well are these partners able to clearly communicate to people in the community how the partnership's actions will address problems that are important to them?

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Leadership

Please think about all of the people who provide either formal or informal leadership in this partnership. Please rate the total effectiveness of your partnership's leadership in each of the following areas:

- a. Taking responsibility for the partnership
- b. Inspiring or motivating people involved in the partnership
- c. Empowering people involved in the partnership
- d. Communicating the vision of the partnership
- e. Working to develop a common language within the partnership

Please rate the total effectiveness of your partnership's leadership in:

- f. Fostering respect, trust, inclusiveness, and openness in the partnership
- g. Creating an environment where differences of opinion can be voiced
- h. Resolving conflict among partners
- i. Combining the perspectives, resources, and skills of partners
- j. Helping the partnership be creative and look at things differently

Please rate the total effectiveness of your partnership's leadership in:

- k. Recruiting diverse people and organizations into the partnership

Efficiency

1. Please choose the statement that best describes how well your partnership uses the partners' financial resources.

- The partnership makes excellent use of partners' financial resources.
- The partnership makes very good use of partners' financial resources.
- The partnership makes good use of partners' financial resources.
- The partnership makes fair use of partners' financial resources.
- The partnership makes poor use of partners' financial resources.

2. Please choose the statement that best describes how well your partnership uses the partners' in-kind resources (e.g., skills, expertise, information, data, connections, influence, space, equipment, goods).

- The partnership makes excellent use of partners' in-kind resources.
- The partnership makes very good use of partners' in-kind resources.
- The partnership makes good use of partners' in-kind resources.
- The partnership makes fair use of partners' in-kind resources.
- The partnership makes poor use of partners' in-kind resources.

3. Please choose the statement that best describes how well your partnership uses the partners' time.

- The partnership makes excellent use of partners' time.
- The partnership makes very good use of partners' time.
- The partnership makes good use of partners' time.
- The partnership makes fair use of partners' time.
- The partnership makes poor use of partners' time.

Administration and Management

Rate the effectiveness of your partnership in carrying out each of the following activities:

- a. Coordinating communication among partners
- b. Coordinating communication with people and organizations outside the partnership
- c. Organizing partnership activities, including meetings and projects
- d. Applying for and managing grants and funds
- e. Preparing materials that inform partners and help them make timely decisions

Please rate the effectiveness of your partnership in:

- f. Performing secretarial duties
- g. Providing orientation to new partners as they join the partnership
- h. Evaluating the progress and impact of the partnership
- i. Minimizing the barriers to participation in the partnership's meetings and activities (e.g., by holding them at convenient places and times, and by providing transportation and childcare)

Non-financial Resources

A partnership needs non-financial resources in order to work effectively and achieve its goals. For each of the following types of resources, to what extent does your partnership have what it needs to work effectively?

- a. Skills and expertise (e.g., leadership, administration, evaluation, law, public policy, cultural competency, training, community organizing)
- b. Data and information (e.g., statistical data, information about community perceptions, values, resources, and politics)
- c. Connections to target populations
- d. Connections to political decision-makers, government agencies, other organizations/groups

For each of the following types of resources, to what extent does your partnership have what it needs to work effectively?

- e. Legitimacy and credibility
- f. Influence and ability to bring people together for meetings and activities

Financial and Other Capital Resources

A partnership also needs financial and other capital resources in order to work effectively and achieve its goals. For each of the following types of resources, to what extent does your partnership have what it needs to work effectively?

- a. Money
- b. Space

For the following type of resources, to what extent does your partnership have what it needs to work effectively?

- c. Equipment and goods

Decision Making

- a. How comfortable are you with the way decisions are made in the partnership?
- b. How often do you support the decisions made by the partnership?
- c. How often do you feel that you have been left out of the decision making process?

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Benefits of Participation

For each of the following benefits, please indicate whether you have or have not received the benefit as a result of participating in the partnership (yes/no answer only).

- a. Enhanced ability to address an important issue
- b. Development of new skills
- c. Heightened public profile
- d. Increased utilization of my expertise or services
- e. Acquisition of useful knowledge about services, programs, or people in the community
- f. Enhanced ability to affect public policy
- g. Development of valuable relationships
- h. Enhanced ability to meet the needs of my constituency or clients
- i. Ability to have a greater impact than I could have on my own

As a result of your participation in the partnership, have you experienced the following benefits:

- j. Ability to make a contribution to the community
- k. Acquisition of additional financial support

Drawbacks of Participation

For each of the following drawbacks, please indicate whether or not you have or have not experienced the drawback as a result of participating in this partnership.

- a. Diversion of time and resources away from other priorities or obligations
- b. Insufficient influence in partnership activities
- c. Viewed negatively due to association with other partners or the partnership
- d. Frustration or aggravation
- e. Insufficient credit given to me for contributing to the accomplishments of the partnership
- f. Conflict between my job and the partnership's work

Comparing Benefits and Drawbacks

So far, how have the benefits of participating in this partnership compared to the drawbacks?

The scale ranges from 'Benefits greatly exceed the drawbacks' to 'drawbacks greatly exceed the benefits'.

Satisfaction with Participation

The scale ranges from 'Completely satisfied' to 'drawbacks greatly exceed the benefits'.

- a. How satisfied are you with the way the people and organizations in the partnership work together?
- b. How satisfied are you with your influence in the partnership?
- c. How satisfied are you with your role in the partnership?
- d. How satisfied are you with the partnership's plans for achieving its goals?

APPENDIX 4 – WILDER COLLABORATION FACTORS INVENTORY TOOL

The Wilder Collaboration Factors Inventory

Name of Collaboration Project _____

Date _____

Statements about Your Collaborative Group:

Factor	Statement	Strongly Disagree	Disagree	Neutral, No Opinion	Agree	Strongly Agree
History of collaboration or cooperation in the community	1. Agencies in our community have a history of working together	1	2	3	4	5
	2. Trying to solve problems through collaboration has been common in this community. It's been done a lot before.	1	2	3	4	5
Collaborative group seen as a legitimate leader in the community	3. Leaders in this community who are not part of our collaborative group seem hopeful about what we can accomplish.	1	2	3	4	5
	4. Others (in this community) who are not a part of this collaboration would generally agree that the organizations involved in this collaborative project are the "right" organizations to make this work.	1	2	3	4	5
Favorable political and social climate	5. The political and social climate seems to be "right" for starting a collaborative project like this one.	1	2	3	4	5
	6. The time is right for this collaborative project.	1	2	3	4	5
Mutual respect, understanding, and trust	7. People involved in our collaboration always trust one another.	1	2	3	4	5
	8. I have a lot of respect for the other people involved in this collaboration.	1	2	3	4	5
Appropriate cross section of members	9. The people involved in our collaboration represent a cross section of those who have a stake in what we are trying to accomplish.	1	2	3	4	5
	10. All the organizations that we need to be members of this collaborative group have become members of the group.	1	2	3	4	5
Members see collaboration as in their self-interest	11. My organization will benefit from being involved in this collaboration.	1	2	3	4	5
Ability to compromise	12. People involved in our collaboration are willing to compromise on important aspects of our project.	1	2	3	4	5
Members share a stake in both process and outcome	13. The organizations that belong to our collaborative group invest the right amount of time in our collaborative efforts.	1	2	3	4	5

Factor	Statement	Strongly Disagree	Disagree	Neutral, No Opinion	Agree	Strongly Agree
	14. Everyone who is a member of our collaborative group wants this project to succeed.	1	2	3	4	5
	15. The level of commitment among the collaboration participants is high.	1	2	3	4	5
Multiple layers of participation	16. When the collaborative group makes major decisions, there is always enough time for members to take information back to their organizations to confer with colleagues about what the decision should be.	1	2	3	4	5
	17. Each of the people who participate in decisions in this collaborative group can speak for the entire organization they represent, not just a part.	1	2	3	4	5
Flexibility	18. There is a lot of flexibility when decisions are made; people are open to discussing different options.	1	2	3	4	5
	19. People in this collaborative group are open to different approaches to how we can do our work. They are willing to consider different ways of working.	1	2	3	4	5
Development of clear roles and policy guidelines	20. People in this collaborative group have a clear sense of their roles and responsibilities.	1	2	3	4	5
	21. There is a clear process for making decisions among the partners in this collaboration.	1	2	3	4	5
Adaptability	22. This collaboration is able to adapt to changing conditions, such as fewer funds than expected, changing political climate, or change in leadership.	1	2	3	4	5
	23. This group has the ability to survive even if it had to make major changes in its plans or add some new members in order to reach its goals.	1	2	3	4	5
Appropriate pace of development	24. This collaborative group has tried to take on the right amount of work at the right pace.	1	2	3	4	5
	25. We are currently able to keep up with the work necessary to coordinate all the people, organizations, and activities related to this collaborative project.	1	2	3	4	5
Open and frequent communication	26. People in this collaboration communicate openly with one another.	1	2	3	4	5

Factor	Statement	Strongly Disagree	Disagree	Neutral, No Opinion	Agree	Strongly Agree
	27. I am informed as often as I should be about what goes on in the collaboration.	1	2	3	4	5
	28. The people who lead this collaborative group communicate well with the members.	1	2	3	4	5
Established informal relationships and communication links	29. Communication among the people in this collaborative group happens both at formal meetings and in informal ways.	1	2	3	4	5
	30. I personally have informal conversations about the project with others who are involved in this collaborative group.	1	2	3	4	5
Concrete, attainable goals and objectives	31. I have a clear understanding of what our collaboration is trying to accomplish.	1	2	3	4	5
	32. People in our collaborative group know and understand our goals.	1	2	3	4	5
	33. People in our collaborative group have established reasonable goals.	1	2	3	4	5
Shared vision	34. The people in this collaborative group are dedicated to the idea that we can make this project work.	1	2	3	4	5
	35. My ideas about what we want to accomplish with this collaboration seem to be the same as the ideas of others.	1	2	3	4	5
Unique purpose	36. What we are trying to accomplish with our collaborative project would be difficult for any single organization to accomplish by itself.	1	2	3	4	5
	37. No other organization in the community is trying to do exactly what we are trying to do.	1	2	3	4	5
Sufficient funds, staff, materials, and time	38. Our collaborative group had adequate funds to do what it wants to accomplish.	1	2	3	4	5
	39. Our collaborative group has adequate "people power" to do what it wants to accomplish.	1	2	3	4	5
Skilled leadership	40. The people in leadership positions for this collaboration have good skills for working with other people and organizations.	1	2	3	4	5