Leveraging Collaboration—Building Strategic Coalitions Among Boards
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"Large-scale social change comes from better cross-sector coordination rather than from the isolated intervention of individual organizations. Despite the dominance of this approach, there is scant evidence that isolated initiatives are the best way to solve many social problems in today’s complex and interdependent world. No single organization is responsible for any major social problems, nor can any single organization cure it.” (Stanford Social Innovation Review, Winter, 2011)

Message from Linkages Co-Chairs

This document is a direct result of the advocacy of our Linkages Committee to the Province, and has been created using the insights and expertise of governors and senior administrators from our Region 6 member organizations. At the February 3, 2011 Linkages Governors’ Forum on Collaboration, representatives from each of our member organizations worked collectively to provide input that is reflected in this document. It is our hope that this work will be useful and practical as we move forward with our strategic priority to ensure children, youth and families in Region 6 have access to the right services and supports, incorporating family voice and choice, while utilizing effectively planned, coordinated and evaluated cross-sector partnerships when needs extend beyond the capacity of a single system to provide.

This information will be shared with Alberta's Minister of Education with the hope that he in turn will share it with his colleagues and actively engage them in removing policy and administrative barriers to collaboration and in ensuring resources are provided to authorities to assist them in improving outcomes for vulnerable children, youth and families served by cross-sector organizations.

Co-Chairs
Marilyn Bergstra, Trustee, Edmonton Catholic Schools
Louise Charach, Edmonton and Area Child and Family Services Authority

Past Co-Chair
Kim Krushell, City of Edmonton Councillor
## Definition and Key Actions

### Definition of Collaborative Governance

Although definitions of collaborative governance vary in the literature, common elements include commitment to beliefs that participating organizations share responsibility for outcomes achieved through the partnership where joint visioning and goal setting are integral to the process. Clear delineation of roles and responsibilities, expected outcomes; e.g., data to be gathered to gauge progress toward specified outcomes is noted as an essential element. Also evident in the literature is the need to put problem-solving procedures into place and to utilize consensus/collective decision-making strategies and frequent focused two-way communication designed to maintain equal decision-making authority between partners. Balance between partners in terms of power and control is seen as critical to effective partnering and efforts to build trust in relationships between governors and other staff engaged in the collaboration were identified as core to success.

### Key Actions to Facilitate Collaborative Governance Noted by Linkages Forum Participants (listed in random order)

- Create a governance structure for the partnership or collaboration that incorporates the principles of collaboration.
- Use a results-oriented approach that includes well-defined goals/outcomes, measures and data to be collected as evidence of progress.
- Ensure balance and equality between partners related to decision making and problem solving.
- Ensure there is a culture where risk taking is supported and valued as are lessons learned from good tries.
- Establish shared responsibilities, accountabilities and agreements to specific outcomes.
- Use attentive listening and have appreciation for multiple perspectives.
- Get the right people at the table.
- Be flexible and open to new ideas.
- Tell the truth with candour, humility and respect.
- Share information.
- Take a holistic focus on the child, youth and/or family.
- Commit to shared voice and choice.
- Remove silo-based barriers to collaboration.
- Focus on willingness to learn from others.
- Identify lead organization and key contacts.
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The Continuum of Collaboration

- The Continuum of Collaboration (as depicted below) begins with informal networking and cooperative activities that provide immediate and important benefits, such as access to information, enhanced understanding of the broader issues in a community that impact students/clients or patients we serve. It may increase access to existing services through strategies such as sharing resources, staffing or co-location of staff without changing the operations of participating partners in any significant way.

- As the collaboration grows, some strategic restructuring/changes may occur in order to effectively support the collaboration. This may include taking on a joint venture such as the Provincial Protocol Framework Regional Agreement where education and child and family services authorities agreed to phase in creation of success in school plans for children and youth with permanent guardianship orders in recognition of the fact that high school completion rates for these students were significantly lower than those of the general population.

- When sectors, such as education, children’s services and health establish more formal agreements to work on a targeted initiative and it involves assigning resources and changes to current practices, this fits with the criteria needed to be called collaboration.

- Integration refers to combining, creating a new organization, or changing one organization to incorporate the other in such a way that funding, policy and mandates are created to subsume the participating organizations into one entity.
### Necessary Conditions

The following can be used by decision makers to rank the importance of various factors to improve coordination of services and supports for vulnerable children, youth and families.

<table>
<thead>
<tr>
<th>Factors impacting successful collaboration</th>
<th>Conditions</th>
<th><strong>VI</strong></th>
<th><strong>MI</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Context</strong></td>
<td>Past experience with collaboration within the organization and community</td>
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<td></td>
<td>The status, credibility and decision-making authority of the leaders within the collaborative partnership</td>
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<td></td>
<td>The buy-in and support from those in governance/senior leadership positions within partnering agencies, particularly as it relates to allocation of resources and championing the collaborative partnership</td>
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<td></td>
<td>Staff buy-in related to collaborative partnerships</td>
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<td>Parent/family buy-in related to collaborative partnerships</td>
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<td>Community buy-in related to collaborative partnerships</td>
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<td></td>
<td>The alignment of collaborative partnerships to organizational priorities</td>
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<tr>
<td><strong>Culture</strong></td>
<td>Organizational culture that values partnerships and shared services as representing the best interest of vulnerable children, youth and families</td>
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<td></td>
<td>Board commitment to improving coordinated services</td>
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<td></td>
<td><em>Board</em> belief that working collaboratively with partners is an important and viable strategy for improving outcomes for vulnerable children, youth and families</td>
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<td></td>
<td><em>Senior administrative</em> belief that working collaboratively with partners is an important and viable strategy for improving outcomes for vulnerable children, youth and families</td>
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<td></td>
<td><em>Staff</em> belief that working collaboratively with partners is an important and viable strategy for improving outcomes for vulnerable children, youth and families</td>
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<td></td>
<td><em>Parent and community</em> belief that working collaboratively with partners is an important and viable strategy for improving outcomes for vulnerable children, youth and families</td>
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</tbody>
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* VI=Very Important; MI= Moderately Important; FI= Fairly Important; NI= Not Important
## Leveraging Collaboration—Building Strategic Coalitions Among Boards

### Factors impacting successful collaboration

<table>
<thead>
<tr>
<th>Conditions</th>
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<th>VI</th>
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<tbody>
<tr>
<td><strong>Purpose</strong></td>
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<tr>
<td>• Specific mutually created, shared, measureable and realistic goals and evidence-informed strategies to achieve these goals are developed jointly</td>
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<tr>
<td>• Commitment to a compelling and jointly created shared vision</td>
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<td>• Imbalance of power or influence among members is identified and corrected so that all partners are valued equally for their contribution to the partnership and attainment of outcomes</td>
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<tr>
<td>• Clear allegiance to the unique goals and processes that are the reason for the collaborative partnership</td>
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<td>• Milestones to celebrate successes along the way are identified and recognized in ways meaningful to the partners</td>
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<tr>
<td><strong>Membership Characteristics</strong></td>
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<tr>
<td>• Shared respect, trust, understanding and appreciation for each other and their respective organizations</td>
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<tr>
<td>• Incorporation of member and partner organizational strengths and interests into the partnership in ways that take advantage of their unique skills or expertise</td>
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<tr>
<td>• Clarity related to limitations/expectations of partner members</td>
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<tr>
<td>• Commitment to shared vision, goals and beliefs that the benefits of partnership will outweigh the investment</td>
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<td>• Inclusion of members who represent the populations of the community who will be impacted by the partnership and who have explicit or perceived impact or control over relevant issues or assets</td>
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<tr>
<td>• Ability to be flexible, compromise and incorporate diverse perspectives as part of planning and implementation</td>
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<tr>
<td>• View of conflict and diversity as beneficial to the partnership for the richness these differences bring to the table</td>
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<tr>
<td><strong>Structures and Processes</strong></td>
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<tr>
<td>• Involvement of different layers of the organization in decision making, from governance/senior administration to front line operational levels, such as the classroom</td>
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<tr>
<td>• Creation of teams and the development of protocols/letters of agreement (e.g., information sharing, decision making, conflict resolution between participating partners) to facilitate smooth implementation and to minimize system or organizational barriers negatively impacting teams working collaboratively to provide services and supports to vulnerable children, youth or families</td>
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<tr>
<td>• Clear delineation and joint ownership of roles and responsibilities and policy, guidelines or parameters for the collaborative work mutually created by participating partners</td>
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<td>• Flexibility of processes and procedures to adapt to emergent needs or changing conditions</td>
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<tr>
<td>• Regular meetings to monitor progress and make adaptations, as required, through changing circumstances to resolve emergent issues</td>
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</tbody>
</table>

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## Factors impacting successful collaboration

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</thead>
</table>

**Communication**
- Frequent, two-way communication between group members characterized by honesty, candour, openness and caring for team members, and respect for member organizations
- Establishment of formal and informal communication strategies to ensure information flow takes place, as needed, to support the collaborative efforts of the collaborating partners
- All partners have the information they need to make decisions and resolve emergent issues, and all members work collaboratively to find and create solutions, when needed
- Communication within partnering organizations and the community should include ongoing championing of the partnership, and reporting progress and validating the work of the partnership within partner organizations and the community in order to create support for the collaboration and its specified outcomes
- Communication strategies must reflect the diverse cultural styles of stakeholder/staff groups within the community

**Resources**
- The collaborative partnership, including any teams formed to support it, have the resources (e.g., fiscal, material, human) they need to support successful implementation
- Those acting in the role of coordinator or lead for established teams, have the knowledge, skills and attitudes needed to perform successfully in that role

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# Leveraging Collaboration—Building Strategic Coalitions Among Boards

## Benefits of Collaboration/Coordination of Services

### People and Culture
- Improved outcomes for children, youth and families
- Increased trust/relationships between service providers/partners and the families receiving services
- Holistic view of child, youth or family being served as multiple perspectives are considered that cross situational boundaries of the home, school and community
- Increased flexibility and openness to new ideas as expertise from different disciplines is incorporated into planning and implementation
- Better appreciation/understanding of mandates, decision-making criteria/processes and limitations of partner organizations
- Change to culture and practice to incorporate values and beliefs that are needed for successful collaboration
- Decreased frustration for families trying to navigate through multiple systems and receiving conflicting advice/perspectives

### Structures, Administration and Governance
- More efficient use of resources and expanded access to resources within participating partner organizations
- Reduction of gaps and duplication of services
- Broader knowledge and understanding of ripple effects of decision making that enhance policy, practice and administrative decision making
- Team approach that can reduce crisis or need to employ significant intensive downstream costs when the right services are not accessible prior to crisis
- Increased access to expertise of multiple specialists resulting in innovative solutions to challenges that need to be addressed
- Greater sharing of resources, fiscal and human, to meet identified needs
- Increased ability to navigate between systems to access services and supports
- Enhanced ability to create policy, set direction and allocate resources to the right services, supports, programs or initiatives based on collective data garnered from partners, in addition to that available within a single organization
- Expanded network/knowledge at governance and senior administrative levels in addition to front line staff as partners work together to meet needs and solve problems that extend beyond the capacity of a single organization to provide

## Cautions to Collaboration

- Over time, the interests of a partner in participating in the collaboration may change, and the partnership may be weakened as commitment to shared goals and access to promised resources diminishes.
- One or more of the partners may underestimate the costs and human resources needed to successfully implement the collaboration. As a result, the costs of partnership may outweigh the benefits.
- Partners may take on too many collaborations or initiatives to successfully implement and this negatively impacts outcomes and relationships with partners and the community.
- One partner may find that the principles, values or administrative practices of another partner organization are incompatible making continued partnership inappropriate.
- One partner may not fulfill agreed-upon roles and responsibilities, putting achievement of the agreed-upon outcomes at risk.
- There may be a personality clash between key persons in partnering organizations that threatens to derail the collaboration.
- One of the partners may feel there is no equality in decision making or status as part of the collaboration and may feel subsumed by larger organizations involved.
- Agreements between partners lack clarity resulting in differing perspectives (related to participation, access, accountabilities and support) that cause friction between partners.
### Collaboration Risk Management Checklist

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes/No</th>
<th>Action Required to Accomplish</th>
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</thead>
<tbody>
<tr>
<td>Does the proposed collaboration fit within our organizational mandate and align with our goals and priorities?</td>
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<tr>
<td>Have you had sufficient dialogue within your organization with senior administrators, other staff, parents and community members to ensure clear understanding of the need and focus for collaboration? Is consultation required and, if so, in what form and within what timelines?</td>
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<tr>
<td>Do you have enough information to ensure the proposed collaboration doesn’t violate legislation/policy/mandate?</td>
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<tr>
<td>Do you know enough about the proposed partners to know whether or not your organizations are compatible in terms of principles, values and vested interest in working together?</td>
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<tr>
<td>Have you considered the messaging you need to provide to your staff, clients/families/partners/communities to build their support and commitment to the collaboration?</td>
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<tr>
<td>Have you considered the way staff, families, partners and community members will interpret the collaboration?</td>
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<tr>
<td>Are you clear about the interests, expectations, commitment, resources and anticipated impacts of entering into the collaboration?</td>
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<tr>
<td>Are you clear on what your partner’s interests, expectations, commitment, resources and anticipated impact are related to the collaboration?</td>
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<tr>
<td>Are you prepared to put in writing essential partnership elements for the collaboration including:</td>
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<tr>
<td>• Purpose (e.g., vision, values, SMART goals, desired outcomes)</td>
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<tr>
<td>• Major activities (e.g., tasks, board/staff roles/responsibilities/competencies, timelines, procedures, data collection, data analysis, ground rules)</td>
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<tr>
<td>• Scope (e.g., non-negotiable, limitations, decision-making processes, communication strategies, conflict resolution procedures, assessment of progress/outcomes/reporting)</td>
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<tr>
<td>• Financial or resource contributions of partners (e.g., Are anticipated outcomes worth the investment required within the collaboration?)</td>
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<tr>
<td>Have you identified who the lead partnership should be for the collaboration? What criteria was used to make this determination?</td>
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</table>
Key Questions about Collaboration:

- Will the collaboration align with our business plan and strategic priorities?
- Will the collaboration expand reach or access to services and supports that the vulnerable children, youth and families need to be successful?
- Will the collaboration enhance the knowledge, skills and capacity within partnering organizations and participating families that help people to learn, understand and contribute to improved outcomes?
- Will the collaboration build trust and commitment to agreed-upon outcomes between partnering organizations?
- Will the collaboration make it easier to access expertise and collect data from multiple perspectives to improve decision making and leverage resources?
- Will the collaboration help to get the right services and supports to vulnerable children, youth and families faster?
- Will the collaboration better support families by reducing their frustration and building stronger trust with the staff who is supporting the families?
- Will the collaboration produce outcomes that merit the investment to participate?
- Will the collaboration produce results that cannot achieve alone?

Competencies for Collaborative Governance

Forum participants agreed, in principle, that the following characteristics and competencies would be useful for consideration for governors engaged in collaboration and for senior administrators, most significantly the chief executive officer.

Characteristics

- Integrity
- Beliefs and values consistent with effective collaboration with partners
- Warmth, integrity and respect for all engaged in the collaborative process
- Strong relational skills and genuine respect for partners and families engaged in cross-sector partnerships
- Flexibility and openness toward change
- Tenacity and follow through
- Common sense
- Demonstrated ability to take initiative and innovate, when needed
- Persuasiveness and ability to align and mobilize resources
- Strategic and critical thinker
- Mindset to see across boundaries to connections and possibilities
- Belief in the importance of being inclusive and interactive in working across systems, connecting with others/initiatives and involving parents and key partners
- Ability to work collaboratively with partners to instill hope and commitment toward cross-sector collaborations
- Strong desire to bring about change and make a difference (be a change agent)
- Belief in the importance of shared leadership and sharing credit for accomplishments with partners
During discussions it was recommended that these competencies be incorporated into the job descriptions of senior leadership staff and that performance evaluations incorporate them and require evidence to demonstrate use of these competencies as part of the evaluation process. This was in recognition of the important relationship between the chief executive officer and the board in accomplishing organizational goals and priorities.

**Competencies**

- Understanding key partner mandates and limitations.
- Strong interpersonal and communication skills, including the ability to ask the right questions in order to identify and anticipate what data/information is needed to provide an accurate picture of challenges/problems to be solved through cross-sector partnerships.
- Ability to create a compelling dialogue and engage colleagues, staff, partners and stakeholders related to the problem to be solved and the vision/goals of collaborative partnership.
- Ability to provide direction to the chief executive officer related to achieving common collaborative goals, including incorporating progress reporting into current board processes.
- Ability to build strong relationships and develop critical friends within and between systems to create unique solutions to challenges that arise as part of planning or implementing collaborative initiatives.
- Leadership skills and ability to think strategically.
- Ability to analyze data from multiple sources to identify and communicate patterns and potential interaction effects.
- Ability to problem solve and trouble shoot within and between systems.
- Ability to facilitate diverse perspectives and blend into a coherent focus for planning and intervention.
- Active championing of collaborative/collective action within and between systems and in the community.
- Consensus building and conflict resolution skills.
- Oversight of collaborations that include measurable goals, outcomes and objectives.
- Evaluation and performance assessment expertise.
- Strong verbal and written communication skills, including the ability to accurately identify system problems and provide direction to administration that helps solve them.
- Demonstrated ability to model competencies of collaboration.
“We need leadership that acknowledges the complexity and chaos of the world in which we live. We need leadership that is rooted in the sometimes grim reality of our day-to-day world, yet concurrently is able to fuel our highest aspirations and embolden us to great change. We need leadership that is authentically inclusive; recognizes multiple truths in the world; and taps into our shared wisdom. We need leadership that is adaptive and flexible and embraces risk taking, change and failure as opportunities for learning.” (Opening Plenary of the Tamarak CCI 2010 Keynote Summary).

According to Blanchard, Blanchard and Zigarmi\(^1\), when talking about collaboration it is important to differentiate between strategic leadership, focused on the “what’s” that create the structures and processes to align and mobilize resources to achieve the vision, and operational leadership, and focused on the “how’s” that include policies, administrative procedures and practices needed to achieve the vision. They indicate both are essential in effecting transformational change.

Some characteristics they identify as necessary for cultural change are depicted as part of the acronym SERVE below:

| S | Seeing a preferred future  
Leaders are able to inspire, align and mobilize others to create a pathway from where they are to where they need to go |
|---|---|
| E | Engaging and committed to developing others  
Leaders are committed to supporting others in living the vision |
| R | Reinventing continuously |
| V | Valuing results and relationships  
Leaders understand that putting effort into ensuring there is a safe and motivating environment for staff, partners, families and communities as part of the collaborative process matters |
| E | Embodying the values  
Leaders understand trust is earned and their actions, words and decisions all impact their ability to lead |

Strengthening Cross-sector Collaboration

When asked to identify the role of governors in creating the conditions within their organizations to foster commitment and mobilize action geared toward strengthening cross-sector collaboration, participants identified the following nine key tasks.

1. Developing relationships that promote and advance collaboration.
2. Creating a compelling vision and strategic priorities through communication, consultation and engaging others.
3. Building commitment for collaboration through individual and collective action and leading by example.
4. Providing direction and monitoring progress on collaborative goals/outcomes to the chief executive officers/superintendent to ensure that all are on the same page as the board.
5. Advocating to the province/ministers regarding the complex needs in our communities, region and elsewhere in the province. The Province needs to see collaboration as a priority and set policy/resources/foundation in place to support it.
6. Adopt policy that identifies collaboration and coordination of services and supports as a shared responsibility. See the following Linkages proposed policy statement:
   The board/council/authority recognizes that some vulnerable children, youth and families require services from several sectors, community agencies or partners in order to participate fully and achieve their potential as knowledgeable, skilled, caring and contributing citizens. To this effect, the board/council/authority believes they share a responsibility with partners in the community to assist school-aged children and youth in successfully completing high school and making healthy and responsible choices in life. Therefore, the board/council/authority is committed to strengthening partnerships and practices that improve the coordination of services and outcomes for school-aged children and youth within Region 6/the Edmonton Zone.
7. Empowering staff to engage in collaboration and to take good considered risks that will inform practice and have reasonable chances to improve outcomes achieved.
8. Allocating resources for collaboration.
9. Sharing information, credit and promising practices within the organization, and with parents, partners and the community.

Creating a Collaborative Culture

Trust is the building block upon which effective partnerships are based. Successful partnerships require time to establish and mature and to gain clarity related to expectations, limitations, commitment to common goals, measurement strategies for these goals, and resources sufficient to support the partnership or initiative.
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Demarest, Edmonds and Glaser\(^2\) define culture as “the context in which all practices exist. It is the organization’s personality; it’s how things are done around here.” It includes values, beliefs, behaviours and practices of the organization’s members. Cultural change is easy to talk about, difficult to achieve and even more difficult to sustain. When it happens, it can have considerable impact on the organization as a whole and on results achieved in specified areas.

Five critical success factors for cultural change are identified in the literature (Demarest, Edmonds, Glaser\(^3\)):

1. Senior leadership must demonstrate commitment to the long-term process of cultural change through embracing and championing the values and vision, as defined and communicated.
2. Values must be defined in behavioural terms (behavioural, tangible and measurable).
3. Accountability for delivering promised outcomes and demonstrating values through behaviour are critical, as is reinforcement for meeting these expectations (incentives and disincentives).
4. All staff are involved in and buy into the cultural change during all phases of the process.
5. Change initiatives must be realistic and manageable in scope.

When participants were asked to identify what actions governors can or should take to engage staff and stakeholders when cultural change is needed to improve cross-sector collaboration, they spoke about the need to access professionals to assist in planning and implementing change, the importance of board passion and advocacy for change, the power of showcasing successes and sharing information broadly, and the requisite to put resources in place to support the desired changes (particularly facilitation and professional development). Empowerment of staff, creating safety to take considered risks, modelling the importance of learning from mistakes and good tries, as well as successes, and ensuring frequent two-way communication were seen as essential to this process.

**Questions to Gauge the Effectiveness of Collaborating Partner Meetings**

- Did everyone at the meeting have the opportunity to contribute to discussions?
- Were the perspectives and input from all committee members considered?
- Did discussion focus on the agenda topics?
- Did the committee agree with the outcomes or actions identified as part of the meeting?
- Did all partner representatives follow through with their assigned tasks from the previous meeting?
- Were the strengths of each organization identified and used to achieve the shared goals/outcomes of the collaboration?
- Were student/client/family/community needs and priorities incorporated as part of planning and implementation?

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Leveraging Collaboration—Building Strategic Coalitions Among Boards

- Did the chair remain neutral during the discussion?
- Did the meeting help the committee to get closer to achieving the committee's goals?
- Was data used as the basis for decision making and planning?
- Is it clear to all committee members as to who will do what by when and how?
- Was the meeting a good use of time for all members?
- Did committee members feel their views were heard and valued by the committee?
- Did committee members feel confident about raising sensitive issues or topics at the meeting?
- Were the right people/organizations at the meeting?

Articulating Accountabilities

Identifying accountabilities to gauge the effectiveness of collaborative partnerships is more complex than assessing outcomes arising from programs within a single organization. Governors are responsible for setting direction, through articulating the organization’s vision, mission, strategic priorities, policy and resource allocations. Related to collective governance, they are also responsible for working collaboratively with other community partners and authorities to ensure collective action moves forward to improve coordinated services.

Accountabilities for Collaborative Partnerships

**Completion of Team Charter or Committee Terms of Reference**

- Purpose, mission, vision, values
- Goals and outcomes
- Identification of members
- Major activities
- Expectations of members (roles and responsibilities)
- Ground rules
- Limitations, scope, non-negotiables
- Decision-making processes, conflict resolution processes
- Method of assessment of team/committee functioning

**Other factors to consider:**

- Accountability is not about finding out where you have gone wrong; it is the cornerstone of improvement, making course corrections and benefiting from valuable lessons learned
- Budget (clear delineation of person/organization; reporting/milestones)
- Make sure there are outcomes not outputs (must match goals)
- Need to determine outcomes and measurement for the outcomes
- Build costs into the plan to ensure sustainability
- Three levels of collaboration needed—Governance (through Linkages); collaborating partners level (administrators from partnering organizations); case planning teams (front line staff working directly with children, youth and families)
- Ensure time frame and allocation of staff time is realistic; to best utilize time and funds base responsibilities on strengths of individual members
**Accountabilities for Collaborative Partnerships (continued)**

### Data Collection

<table>
<thead>
<tr>
<th><strong>Other factors to consider:</strong></th>
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<tbody>
<tr>
<td>• need to have administrative time available</td>
</tr>
<tr>
<td>• balance qualitative and quantitative data collected that matches goals/outcomes</td>
</tr>
<tr>
<td>• ensure partners have right skills/supports to implement data collection</td>
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</tbody>
</table>

- Agreement on four to five data points (as a maximum) to be used to gauge progress toward agreed-upon common goals
- Agreement of the role and responsibility of member organizations to collect what data and by when
- Agreement that partnering organizations participating will jointly receive updates at agreed-upon times

### Agreements/Protocols

<table>
<thead>
<tr>
<th><strong>Other factors to consider:</strong></th>
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</thead>
<tbody>
<tr>
<td>• ensure there is clarity and specificity</td>
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<tr>
<td>• need to build for succession planning/sustainability</td>
</tr>
<tr>
<td>• review agreements and protocols at regularly scheduled intervals (as agreed to between partners)</td>
</tr>
</tbody>
</table>

- Agreements are written and accepted by participating organizations to enable effective sharing of information
- Processes are in place to facilitate conflict resolution between partners when systemic issues impede the ability of staff to work collaboratively
- Agreements are effective in reducing barriers to collaboration and enabling effective collaboration
- A lead partner is identified to chair the team/committee and the role and responsibility is clearly articulated and agreed to by member organizations

### Alignment with Member Organization Values, Principles and Priorities

<table>
<thead>
<tr>
<th><strong>Other factors to consider:</strong></th>
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<tbody>
<tr>
<td>• recognize that principles and priorities of organizations may be different, and find a way to work around this</td>
</tr>
<tr>
<td>• identify to senior administrators or boards when issues are related to systemic barriers</td>
</tr>
<tr>
<td>• need education to get awareness of the value of the work (collaboration)</td>
</tr>
<tr>
<td>• need flexibility as models of governance differ</td>
</tr>
</tbody>
</table>

- The team/committee charter is aligned with all member organization values, principles and priorities for service
- Decisions of member boards reflect these common values and principles
### Accountabilities for Collaborative Partnerships (continued)

#### Planning and Reporting Processes for Member Organizations

- Include analysis of progress of collaborative partnerships
- Include data to substantiate evaluation of effectiveness of partnership in reaching common goals

#### Communication

- Consultation with staff, clients, families, community partners, and the community is planned/implemented to provide accurate information, to seek diverse perspectives, to provide engagement to strengthen the collaboration and to identify goals of the partnership
- Communication between participating partners is two-way, constant and includes different mechanisms to increase the reach of information and build commitment for collaboration within and between partnering organizations

#### Team/Committee Member Perspectives

- Team/committee members agree the work on the team or committee is valuable (individually and collectively)
- Members believe that participation has increased the quality of collaboration between partners and can identify how the quality has improved
- Members agree that participation on the team/committee has enhanced relationships between team members and participating organizations

#### Other factors to consider:

- need joint training so everyone has common skills sets
- need a common belief that all actions must have a positive impact on the child/youth/family
- need to embed a collaborative focus into business models and need to highlight and reinforce it
Recommended Components of a Memorandum of Understanding

When it is important to formalize the relationships and agreements between organizations, it may be useful to create an effective memorandum of understanding (MOU). This process ensures clarity between the parties involved in the collaboration to ensure the expectations and contributions of partners involved is well articulated and understood. This agreement may help to stipulate whether you or your partner has liability, what you and your partner are willing to provide, how the division of tasks and responsibilities/accountabilities will be differentiated, and how the collaboration will be monitored/evaluated. Recommended components follow.

<table>
<thead>
<tr>
<th>Component</th>
<th>Descriptor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Statement of Overall Intent/Purpose</strong></td>
<td>This brief description of the intent of the collaboration, including the outcomes desired through the partnership, makes clear the purpose for which each party is entering into the agreement.</td>
</tr>
<tr>
<td><strong>Identification of Parties</strong></td>
<td>This component clearly identifies those who are participating in the agreement. It should provide specific information related to the types of organizations engaged in the collaboration.</td>
</tr>
<tr>
<td><strong>The Timeframe for the Agreement</strong></td>
<td>This section clearly stipulates the term for the agreement.</td>
</tr>
<tr>
<td><strong>Assignment of Responsibilities</strong></td>
<td>This section of the agreement is very important. It describes the roles and responsibilities played by each organization in accomplishing the purpose or outcomes specified. It is usually better to begin by listing sole responsibilities of organizations participating, and then outlining joint responsibilities.</td>
</tr>
<tr>
<td><strong>Disclaimers</strong></td>
<td>Many agreements will contain disclaimers so that it is clear what the MOU will not do.</td>
</tr>
<tr>
<td><strong>Financial Agreements</strong></td>
<td>When the MOU includes financial resources, it is important to specify who will contribute what, how much and by when, and how payment will be made.</td>
</tr>
<tr>
<td><strong>Risk Management/Sharing</strong></td>
<td>This is another important section of the MOU. This is where all parties clarify what they will be responsible for if something goes wrong. A formal MOU may include statements of indemnification or how it will deal with any potential losses/damages. Ideally these clauses are mutual in that each party would be responsible for its own negligent acts or omissions. Seeking legal advice is recommended for this section and other components of an MOU when insurance or liability may be an issue. Insurance requirements may be included in this section or in a new section of the MOU.</td>
</tr>
<tr>
<td><strong>Signatures</strong></td>
<td>In this final section, a representative from each partnering organization with authority to enter into a binding agreement should sign the MOU. Each partner should retain a signed copy of this agreement.</td>
</tr>
</tbody>
</table>
Linkages Regional Priority Agreement of Member Boards

Principles Underpinning the Strategic Priority
- Child/youth centred and family focused.
- Collaborative, coordinated and accessible.
- Flexible, responsive and solution focused.
- Function based.
- Sustainable.
- Evidence based.
- Fiscally responsible.
- Services/care characterized by:
  - unconditional commitment
  - individualized support
  - strength and needs based
  - culturally competent
  - community based
  - fair and equitable
  - nurtured relationship.

Projected Outcomes of Strategic Priority
- Improved coordination, access and effectiveness of cross-sector supports to school-aged children and youth.
- Reductions to gaps and duplication of services and improved ability to respond to emergent needs.
- Improved knowledge and practice by staff within member organizations.
- Strengthened relationships and ability to navigate within and between systems or organizations.
- Improved satisfaction of children, youth and families accessing cross-sector services.

Governance Actions to Support Implementation of Strategic Priority
- Request information from administration regarding current/proposed partnerships and the impact they are having on children, youth and families as part of current planning and reporting processes.
- Promote collaboration and coordination of services and supports to school-aged children and youth through sharing work underway in Region 6/the Edmonton Zone with constituents, stakeholders, and municipal and provincial politicians.
- Advocate for increased funding to staff coordinator positions within partnering organizations (at the site and system level) needed to successfully implement initiatives such as the Provincial Protocol Framework to Enhance the Success in School for Children and Youth in Care and wraparound approaches developed locally to support vulnerable children and youth served by more than one sector (e.g., education, health, children’s services, municipalities and community agencies).
- Advocate that ministries such as Alberta Education, Alberta Children and Youth Services, and Alberta Health and Wellness review, revise and create policy and administrative regulations to support coordination of services and remove system-level barriers that currently impede local ability to partner effectively or that include unnecessary administrative processes.
- Place this topic on the agenda of provincial organizations to build awareness and championing of advocacy for actions that promote increased collaboration and coordination of services for school-aged children and youth.