



# PARTNERSHIP GUIDEBOOK

THIRD EDITION

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# 1

## WHY PARTNER

Every day across Ontario, service providers work with job seekers who have a disability to identify their abilities and interests, employment opportunities, as well as existing challenges and available supports.

To achieve successful outcomes, service providers require a variety of resources, such as functional expertise, specialized skill sets and developed service solutions. These are considerable offerings for any single service provider to deliver on their own. And, it is why choosing to collaborate and partner with service providers in your community can be critical for the overall success of the job seeker, and in turn, your organization. This is as true in both large, urban areas and smaller, rural communities.

Many service providers have been engaged in beneficial partnerships for years, yet they have never formalized their relationship. Other organizations struggle to offer a full suite of services to their clients, and they have yet to explore the power of partnership and collaboration.

Every service provider is different despite having the same mandates and often an overlap in the target populations they serve. Providers usually find they have unique skill sets and tailor their delivery depending on their funding structure and targets.

For instance, if you are a Developmental Services provider, your services may be focused on intensive and long-term supports. If you are an ODSP Employment Service or Employment Ontario provider, your offerings may be more short-term and light-touch.

All organizations provide excellent service to job seekers who have a disability, yet each may be set up to serve different support needs within the same population. They can benefit considerably by working together in a collaborative partnership.

We can accomplish many great things with limited resources, and our successes will only increase as we work collectively in our communities to provide the best possible employment services and solutions to our clients and the businesses we serve.

Throughout this guide, the terms *organization*, *agency*, *service provider* and *provider* are used interchangeably and do not denote any specific type of provider unless otherwise noted.

# 1

## The benefit of documenting partnerships

Through ODEN's research on partnerships and collaborations in the sector, we noted there are many organic relationships across the province, all formed to ensure the best possible outcome for job seekers and businesses. These naturally occurring relationships have strength because they are not mandated or prescribed. Instead, they are formed to deliver the best quality and to share resources efficiently.

However, the research also noted many of these collaborations are operating with little to no documentation or in-depth knowledge at the leadership level. Also noted, there is a high risk the relationship may abruptly come to an end if front-line staff working collaboratively leave the organization.

Documenting your organization's existing relationships, partnerships and collaborations will ensure continuity through personnel changes and eliminate any potential confusion. This guide will help you move through the documentation process with efficiency and ease.

If your organization is not engaged in any collaboration or partnership currently, this guide will assist your considerations of sharing clients, skills and resources with other service providers in your area.

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## WHAT IS A PARTNERSHIP?

In this guide, *partnership* and *collaboration* are treated as interchangeable terms, with the common theme being to support organizational effectiveness in order to meet mandates, targets and goals, and deliver the best possible employment service for job seekers and businesses.

**Partnership** – *A relationship where two or more parties, having common and compatible goals, agree to work together for a particular purpose and/or for some period of time. This relationship may be anything from a loose agreement to communicate and share information to a concrete joint venture. Partnerships may be short or long term. When initiating a partnership, partners need to reach a common understanding of what the partnership means to them.*<sup>1</sup>

**Collaboration** – *Two or more different partners (e.g. individuals, organizations, networks) coming together from various sectors, groups and/or neighbourhoods to work toward common goals. Collaborations are about people and organizations building, nurturing and maintaining mutually beneficial relationships to achieve shared goals that will benefit all partners.*<sup>2</sup>

Many organizations use the term collaboration to describe their style of work. Already, there are many organizations working together, sharing best practices, leads on jobs and referring clients to each other. This is the true spirit of collaboration. However, it is only when you start to formalize the processes and procedures by which you work together that the relationship becomes an actual collaboration or partnership.

When service providers partner, they experience:

- Increased organizational knowledge and improved service system capability;
- Greater innovation and flexibility to respond to changing, emerging or more complex client needs;
- New ideas and strategic thinking;
- Efficiency and the ability to maximize resources.

### The purpose of partnership

In the Employment Service Sector, service providers can work with other organizations to increase organizational effectiveness and improve organizational efficiency. When you collaborate or partner for the benefit

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1 Collaboration Roundtable. (Spring 2001). *Tools for Building and Sustaining Partnerships*.

2 UWT Collaborative Partnerships Toolkit 2010.

# 2

of job seekers and businesses in your community, you are focused on organizational effectiveness, and efficiencies are naturally created along the way.

**Organizational effectiveness** means an organization can achieve its stated mission more successfully. For Employment Services in Ontario this means making better, more sustainable, and higher quality matches for job seekers and businesses, and providing the right coaching and retention services to ensure success for all, regardless of support needs.

**Organizational efficiency** means an organization can accomplish its work more quickly and with fewer resources. For example, ODEN shares its back-office requirements: some operations, including payroll and Human Resource services, are provided by a larger organization that is better prepared to deliver these important functions. This frees up time for ODEN's staff to focus on best servicing the network's members and cultivating relationships with businesses across the province.



Use the **Organization Self-Reflection Worksheet** on page 35 to explore which topics must be addressed before entering into a partnership. This will create awareness of what strengths and needs your Employment Services have, what your clients are getting from your current service, and where you can work with other organizations to increase success for your clients and organization overall.

The next section will provide more detail on developing a partnership with the organization(s) with whom you've chosen to collaborate.

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## PARTNERSHIP DEVELOPMENT

By partnering with other service providers, skills and resources can be pooled to create more successful outcomes for job seekers.

Once you've reflected on how you can better serve job seekers and businesses, and you have identified another organization in your community beneficial to partner with, you're ready to move forward with partnership development.

Working through the steps below and documenting each step will assist both organizations in laying the groundwork for a strong and sustainable relationship.

1. Clearly define the purpose for partnership.
2. Determine resources and information needed.
3. Identify the roles involved in the partnership.
4. Implement a Performance Management System.
5. Create and sign a Memorandum of Understanding or Partnership Agreement.

You can best prepare your organizations to work together by establishing a working group, whether it's made up of one person from each organization or multiple representatives. Prepare to meet and work through these steps together.

Partnership development is a process that typically takes more than one meeting. Depending on the size and scope of the partnership, as well as the size of the organizations involved, this process can often take several weeks to several months.

Documentation is a key component because it creates a roadmap for your partnership. It is also essential for informing your organization's leadership and ensuring ongoing support from all parties. To assist in this process, each step in this section contains at least one worksheet or template for your working group to use.

### 1. Clearly define the purpose for partnership

Clearly defining the purpose and scope of the collaboration is very important when establishing the partnership.

Understanding why each service provider is partnering, what resources they have to offer and what responsibilities they are agreeing to fulfill will result in a clear purpose and scope.

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*Agency A provides services to clients in the Developmental Service sector. They excel at assisting people who have a disability in skills building, providing one-on-one support, helping clients participate in activities in the community, and collaborating with family, networks and other support people.*

*Agency B provides Employment Services to clients who have a disability and are eligible for ODSP ES or can access the services of an Employment Ontario office. They excel at assisting job seekers to identify interests, preparing job seekers for the world of work, accessing funding for accommodations or resources needed for the job, and building strong relationships with employers.*

*In this example, if client of Agency A express a desire to work, they may need help in finding and securing a job, as well as preparing for it. Agency A does not specialize in this type of service delivery and, while they may be able to help their client achieve this goal, it would be more effective for their client if they work in collaboration with Agency B.*

*Agency B may have all the skills on their team needed to prepare for, find and secure a job, but they don't have the staffing to provide intensive or on-the-job supports to ensure the match is a long-term success. For this reason, it becomes beneficial for them to work alongside Agency A.*

Partnership discussions should involve determining what each service provider can offer, identifying any gaps in service and how to address them, and developing an initial plan or pathway for the client to access services from Agency A to B and into a job.

These introductory discussions also provide an opportunity for the organizations to discuss targets, funding and available resources, and will lead to better insight into whether the partnership will require a formal agreement or if a Memorandum of Understanding (MOU) will be sufficient.

As well, clearly defining the purpose of your partnership will help identify those who need to be engaged in discussions. For instance, will the partnership require the Chief Executive Officer or Executive Director of the organization to approve it, or will it be approved at the Program Manager level? Depending on the size and structure of an organization, there may be multiple people involved.



Together, work through **Partnership Questions – a conversation guide when starting to explore a partnership** on page 39 to clearly define the purpose for your partnership.

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## 2. Determine resources and information needed

Once you work through the previous step and have a clear picture of what each organization will contribute to the partnership, you can move on to determine any additional required resources and inform your organization's leadership of these needs.

### Assessment of Resources

Identify available resources and predict what financial and human resources will be needed to ensure the job seeker's success is achieved, alongside the partnership goals of both your organizations.

List resources already available in each organization, such as access to programs and workshops, one-on-one employment planning, access to funds for certifications or work-related supplies, such as safety boots or WHMIS Certification, on-the-job coaching and wraparound supports.

### Information Gathering

Service providers should identify what type of information they require for their programs and funders, and create a system to share documentation wherever possible within the partnership.

For instance, sharing intake and emergency contact forms, and creating consent forms that name both partners reduces the strain on the job seeker and creates greater overall efficiencies for all parties involved. Less time is spent collecting information and more time is focused on job skills, search and success.

The job seeker is central to the partnership process and their path should be well thought out. This component ensures easy access to supports and reduced time and energy on administrative requirements for each service provider in the partnership.



Fill in the **SWOT Analysis** template on page 43 to determine your partnership's strengths, weaknesses, opportunities and threats. Use this exercise to focus on identifying financial and human resources already in place, as well as those still required for a successful partnership.

See also **Selection Matrix to Identify and Choose Partners & Collaborators** on page 44. This is a tool that along with the SWOT Analysis can be used to identify in an objectively manner potential partners to involve in a collaboration or project. The tool can also be use as background information to satisfy funder needs and requirements to demonstrate accountability and that a thorough process has been used to determine partners in a project.

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## 3. Identify the roles involved in the partnership

Each service provider has roles and responsibilities in a partnership. Defining what these roles are and who will be doing them is the next step in partnering. This essential step will ensure the right people are identified for each stage in the client's journey from job seeker to employment.

Partnership between service providers requires the involvement of many people. It is important for staff to know their role in the partnership, when they should involve their manager, co-worker or other support, and what tasks they are ultimately responsible or accountable for.

Every organization uses different job titles. For the purpose of this guide, the umbrella terms *Employment Specialist* and *Job Coach* will be used.

*There is a job seeker who has a disability who has a goal of employment. The ODSP ES or Employment Ontario (EO) agency (Agency B) will provide support via an Employment Specialist to aid in job search, interview preparation, introductions and negotiations with employers and, ultimately, securing the job.*

*The DS agency (Agency A) will provide support via a Job Coach for the person on-the-job, communicate with family and other support networks as needed, and will ensure the wrap around supports required for success are in place.*

Intake and assessments will be provided by whichever organization the job seeker originally contacts. One organization should be identified as the main contact, and when the job seeker begins another stage in their journey, the contact can be reviewed to determine if it is still the best choice. For example, a job seeker's main contact organization will change when the majority of support or service moves to the other organization.

## Working with the RACI model

The RACI model is used to identify responsibilities and, therefore, avoid confusion. Used primarily in Project Management, the RACI is an excellent tool for establishing roles in the partnership and tasks necessary to ensure client needs are met.

Without clearly defined roles and responsibilities, it is easy for partnerships to run into trouble. When people know what is expected of them, it is easier for them to complete their work successfully at a high level of quality.

The RACI acronym stands for:

**Responsible (R):** The person who does the work to actually complete the task. As a rule, this is one person. Examples might be an Intake Worker, Job Coach or Employment Specialist.

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**Accountable (A):** The person who is ultimately answerable for the completion of the task. This includes decision-making authority and veto power. Only one accountable person can be assigned to a task. Examples might be a Program Manager, Director, Executive Director or Chief Executive Officer.

**Consulted (C):** The people who provide information for the partnership and with whom there is two-way communication. This is usually several people, often subject matter experts. Examples might be an Employment Specialist, Support Worker or Job Coach.

**Informed (I):** The people kept informed of progress and with whom there is one-way communication. These people are affected by the outcome of the task, so they need to be kept up-to-date. Examples might be an Executive Director, Program Manager or family member.

## How to create a RACI Matrix

1. Identify all the tasks involved in the partnership delivery and list them on the left-hand side of the chart in completion order, from first to last. For example: intake forms, assessment and eligibility checks, discovery/planning with client, employment search steps and so on.
2. In the second column from the left, designate which organization will be taking the lead on each task. Only one organization should be assigned to each task.
3. Identify all the roles and list them along the top of the chart. For instance: Job Coach, Employment Specialist, Intake Worker, Program Manager, Executive Director and so on.
4. Complete the chart by identifying who has responsibility (R) and accountability (A) for each task, as well as who will be consulted (C) and informed (I).
5. Ensure every task has a role responsible (R) and a role accountable (A) for it.
6. No tasks should have more than one role accountable (A). Resolve any conflicts where there is more than one role accountable for a particular task.
7. Share, discuss and agree on your RACI Matrix with those identified in the roles, as well as others actively involved in the partnership, prior to beginning your hands-on work together.

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## RACI Matrix Example

Organizations will have varying structures in terms of task flow and use of different job titles. **This RACI Matrix is for example purposes only.** This example will provide a clearer picture of how to create your own Matrix to support your partnership depending on where the job seeker starts their journey, how the organization functions, and how the roles and tasks in your RACI Matrix will change.

TASK	AGENCY NAME	JOB COACH	EMPLOYMENT SPECIALIST	INTAKE WORKER	PROGRAM MANAGER	ED/ CEO/ DIRECTOR
Intake forms	Agency B	C	C	R	A	I
Assessment and Eligibility Checks	Agency B	C	C	R	A	I
Discovery / Planning with Client	Agency A	R	A	C	C	I
Employment Search	Agency B	C	R	I	A	I
Job Match	Agency B	C	R	I	A	I
Job Coaching	Agency A	R	A	I	I	I



Create your own **RACI Matrix** using the template on page 51 to identify and clarify the roles that will be part of your partnership.

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## 4. Implement a Performance Management System

Any successful service provider has a strong Performance Management System in place to ensure service quality. Solid partnerships promote a culture of continuous improvement among partners. They make meetings a safe place to communicate challenges and successes, as well as offer suggestions for improvement and provide feedback.

When forming your partnership, encourage communication about concerns and accomplishments from the onset by:

- Cultivating a culture of open communication;
- Encouraging feedback;
- Asking about suggestions for improvement via email or online surveys;
- Meeting on a regularly scheduled basis (perhaps quarterly), with more frequent meetings and/or conference calls when particular challenges or new ideas arise;
- Conducting retreats for staff or teams in the partnership.

Ensure communication policies and practices between service providers are documented and understood by everyone.

## Conduct Partnership Reviews To Manage Performance

Conduct a formal review of the partnership's progress and difficulties at least twice a year. Whenever possible, use an external consultant or create an impartial internal system to perform the evaluation.

Reviews should examine:

- **Leadership**
  - o Are the correct people involved in the decision-making and approval processes?
  - o Are they responsive and able to support the team(s)?
- **Division of labour**
  - o Are the partnership roles identified the right ones?
  - o Does the amount of work equal the benefit for the organization?
  - o Are the roles serving the job seeker?
  - o Are you achieving successes for the job seeker based off these roles?
- **New opportunities for partnership**
  - o Are the service providers working together in a way that leads to new services, better outcomes and better use of resources?
  - o If yes, are there ways to expand the partnership?
  - o If no, what steps can be taken to improve the services delivered?

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- **Funding**

- o Are the service providers able to maximize their funding for staff and client supports in this partnership?
- o Are there better ways to use funding?
- o Are targets being met and contracts fulfilled for government funding?

- **Visibility and public support**

- o Has the partnership increased awareness in the community?
- o Are more businesses engaging with the service providers?
- o Are businesses satisfied with the service and support received from the partnership? Tip: a simple satisfaction survey will provide this information.
- o Has there been an increase in job seekers/clients since the partnership started?

Ensure your reporting and feedback systems are set up to confirm monitoring systems are in place and each partner collects all necessary data.



Investigate what existing Performance Management Systems your organizations already have in place, and see how they can be adapted for evaluation and continuous improvement of your partnership.

## 5. Create and sign a Memorandum of Understanding or Partnership Agreement

Once you have decided your organizations will work together, it is recommended you create and sign a Memorandum of Understanding or, depending on the complexity of the collaboration, you may require a Partnership Agreement.

### Memorandum of Understanding

A Memorandum of Understanding (MOU) is an agreement made between two or more partners. An MOU is normally signed when organizations agree to work with each other and provide services in collaboration. In an MOU, all parties are considered equal and agree to work together in good faith. This is different from a contract in which one organization pays another organization to supply goods or services. It is also different from a contract between a donor and recipient organization. An MOU cannot be used as a substitute for a legally binding contract.

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## When it may be appropriate to use a Memorandum of Understanding

- When there is no shared funding between the partnering organizations.
- When there are only two or three organizations working together.
- When the services offered are very clear and well established.

## Partnership Agreement

Partnership Agreements are formal, written documents that explicitly detail the relationship between the partners, and their individual obligations and contributions to the partnership. Since Partnership Agreements should cover all possible situations that could arise during the partnership's life, the documents are often complex. Therefore, legal counsel is generally recommended in drafting and reviewing the finished contract.

## When it may be appropriate to use a Partnership Agreement

- When the collaboration requires funding to be shared between organizations.
- When you are creating services together, for example curriculum or programs.
- When there are multiple organizations involved.



Refer to page 52 for an example of a **Memorandum of Understanding** and see page 56 for an example of a **Partnership Agreement**.

# 4

## HOW TO DISSOLVE A PARTNERSHIP

Partnerships allow organizations to combine resources and build on their respective strengths. They allow organizations to augment areas in which they are not as strong and bolster resources that may be lacking. Partnerships also provide a great opportunity to learn from each other.

Partnerships will end at some time. There are many reasons partnerships end. Most often, they end because they have reached their objectives or have made as much progress as possible toward their objectives. Sometimes partnerships end because funding is no longer available to allow their work to continue. Other times, the organizations cannot work without insurmountable differences or conflict.

From the onset, your Partnership Agreement or MOU should always have a section that addresses how you will end the partnership. There should also be a documented agreement on how to resolve potential conflict. Often organizations have well-designed conflict resolution tools that can be used to create this resource.

As well, there should be an agreed to timeline for dissolving the partnership, such as 30, 60 or 90 days with written notice from either party. It is important to provide enough time to ensure all stakeholders are informed of any changes and that they are not left without support. The partnership's dissolution should never be allowed to negatively affect your clients, whether job seekers, businesses or the community at large.

If you reach a point where you need to dissolve a partnership, you often have two choices: (a) You can let the partnership simply end on the agreed-upon date; or (b) You can dissolve the partnership in a way that acknowledges its accomplishments and sets a foundation for working together again in the future.

However you choose to proceed, as the partnership approaches its date for dissolution the leadership of both organizations should:

- Identify the partnership's major accomplishments and acknowledge all staff involved;
- Determine how to inform people both inside and outside the partnership of the decision to dissolve;
- Document the partnership's history and the lessons learned from its operations;
- Select a time, place and event to celebrate what has been accomplished.

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## CASE STUDIES

Ultimately, a strong and well-defined partnership built on common values and vision will benefit job seekers, as well as Developmental Service, ODSP ES, and EO service providers.

Regardless of the level of support needed, an organization working in partnership with other service providers can deliver seamless quality service to a job seeker.

For instance, when a job seeker who has a developmental disability comes to an ODSP ES location that has partnered with a Developmental Service provider, that job seeker will have access to the job search services they need as well as on-the-job support they may require to maintain employment.

As one organization involved in a partnership in Eastern Ontario says, **“No matter what door you come through, you can get service and support”**. This results in success for your job seeker, as well the businesses you’re working with and all organizations involved in your partnership.

### Case studies and client pathways

The case studies referenced in this guide will include their client pathway. It is important to note that just as a job search is individualized, the way a job seeker uses your services will also be individualized. There is no one set pathway for your job seeker. It’s important to always consider how your organizations will work together in your partnership to ensure the services are seamless and revise the process whenever necessary.

# 5

## Case Study #1

### Community Living Campbellford/Brighton and Employment Assistance Resource Network

**“We do whatever it takes to ensure success for the person, including sharing job coaching resources wherever necessary.”**

In 2009 Community Living (CL) Campbellford/Brighton’s Employment Supports program was operating in what they identify as “the old model of Social Enterprise and group-based service.” The agency felt that their philosophy was Person Centered but their practice was not. They had a desire to change the way they delivered services, to become more focused on opportunities within their community and local businesses.

To take their service delivery to the next level, CL Campbellford/Brighton engaged in a strategic planning process with the help of a consultant. As a result, they determined the agency would create a formalized process for Employment Supports, close the Social Enterprises and adopt a model of inclusive, community-based employment.

The first step was to develop a formalized internal referral process to their Employment Supports staff. Individualized planning happened annually, but to ensure the people they supported had the opportunity to identify an interest in employment, the agency met with everyone to discuss employment immediately. If the person had a goal of employment, then a formal referral form was created at the planning session and submitted to the Employment Supports program.

The agency began to engage businesses through outreach and business engagement events, such as panel presentations and corporate breakfast meetings, resulting in identifying and fostering a Business Champion.

They then began meeting with local businesses with the assistance of their Champion and started to see success. People were getting good jobs and because of that success, local service provider Employment Assistance Resource Network (EARN) was interested in sharing supports and resources. That is when the collaboration and partnership started to form.

CL Campbellford/Brighton had identified a need to engage with other professionals, specifically EARN, the local ODSP Employment Supports service provider. Initially the partnership did not come together and Community Living provided a one-stop shop approach to supported employment.

However, as demand grew CL Campbellford/Brighton and EARN developed a very close working relationship based on the value and guiding principle of “We do whatever it takes to ensure success for the person, including sharing job coaching resources wherever necessary.”

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The past nine years has seen tremendous success. Of the 130 people served by CL Campbellford/Brighton, over 70 percent have accomplished their personal goal of employment. As the service provider, EARN has also expanded and now dedicates a Job Coach in each of the communities of Campbellford and Brighton.

The collaboration between the two organizations has become so fluid that in 2018, when CL Campbellford/ Brighton implemented their seven-week Summer Employment Transitions (SET) program, EARN met with each student at the end of the summer to ensure supports were maintained. This meant that they would take on the remainder of the job coaching required to ensure the success of each student.

As well, planning has already happened to ensure EARN meets with each of the 32 SET students in June 2019 to register them for service, so the supports are seamless at the end of summer next year.

## Case Study #1: Client Pathway

This is an example of the client pathway process for a DS and ODSP ES partnership based on Community Living Campbellford/Brighton and Employment Assistance Resource Network's case study.

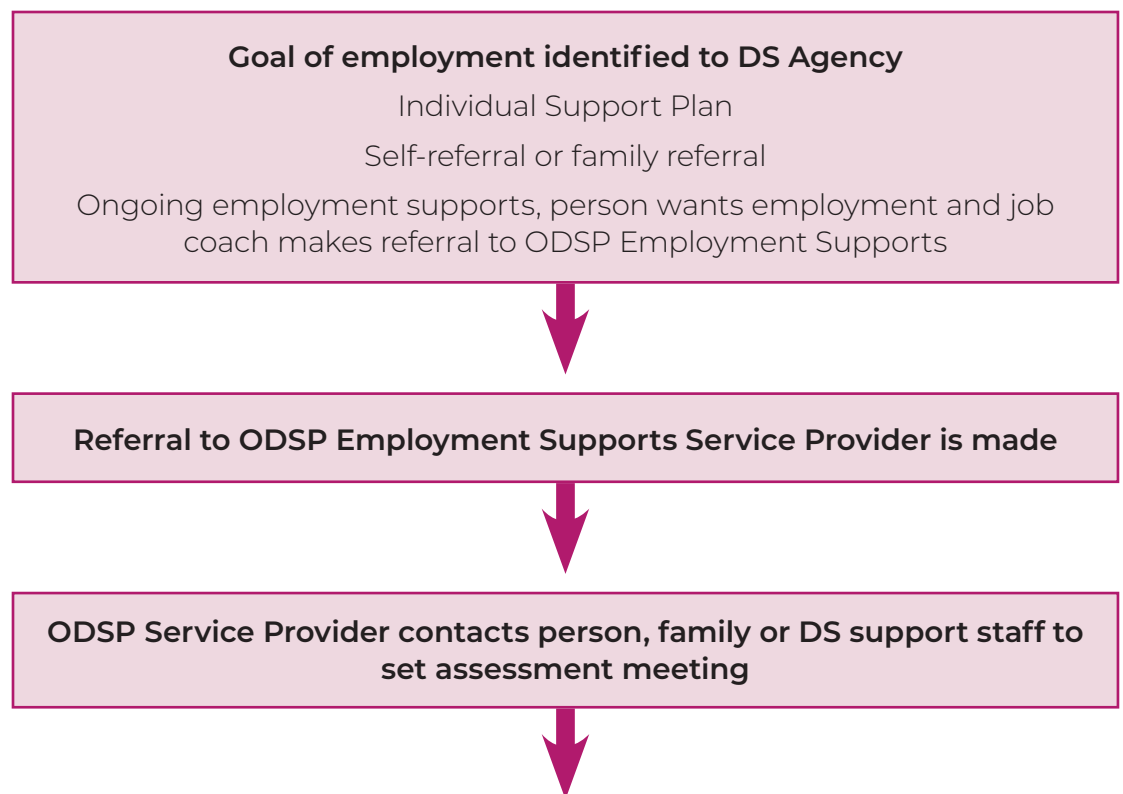
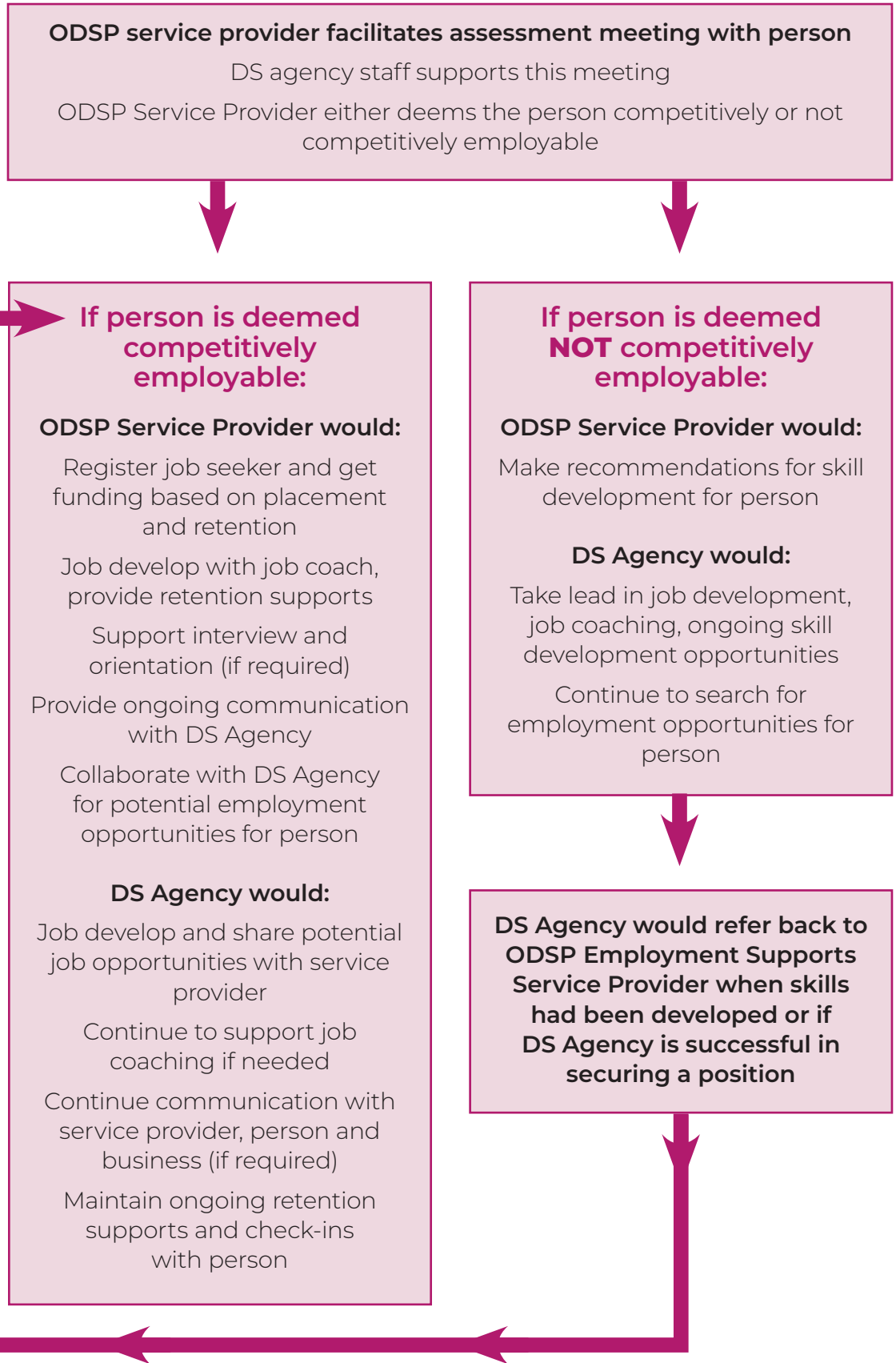


Chart continues on next page.

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## Case Study #2

### Inclusive Employment Program: Career Services and Employment + Education Centre

**“No matter what door you come through, you can get service and support.”**

Career Services and Employment + Education Centre (EEC), both located in Brockville Ontario, have developed a formalized and highly structured partnership to better serve job seekers in their community who have a disability.

What started as a collaborative approach between two organizations on a case-by-case basis, proved to perform so well they decided to formalize the partnership. Having recently concluded the first year of programming, the Inclusive Employment Service Program is experiencing high retention rates and has engaged four additional service providers in the community for referrals and service supports.

The purpose of the Inclusive Employment Service Program is to collaborate and enhance opportunity, employability, as well as the effectiveness and sustainability of employment outcomes for individuals who have varying disabilities and/or barriers to employment.

Initially, there was an informal collaboration to assess needs and deliver services to specific clients who needed enhanced supports. With the decision to move forward with a formal partnership, the organizations are able to better serve the community, especially those who do not fit traditional programs within a single organization. Program staff in the partnership report job seekers come from everywhere, including: ODSP Employment Services, Developmental Services, EO Centres, Ontario Works, high schools and colleges, and community mental health programs.

All client supports are delivered via Career Services, the EEC and other community partners who are referral sources and offer supports if needed.

For instance, an EEC client who accesses programming and funding dollars can also get intensive job coaching and ongoing retention supports from Career Services as a result of this partnership.

The collaboration of services between agencies creates an intensive, holistic service for their job seekers. Through this partnership, they increase employment outcomes and ensure long-term supports are in place to foster success.

Both Career Services and EEC emphasize the importance for agencies to reflect on what they are and are not, their strengths and weaknesses; identify where there are gaps in service and where their job seekers struggle

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to succeed; and then work together to address those needs. Program staff say the benefit of this partnership is that “No matter what door you come through, you can get service and support.”

An added benefit of this partnership between the agencies has been the ability for them to expand their network of community partners, develop additional contacts across different ministries, and foster collaboration between job development teams. From operating this program each of the partners has been able to assist the local business community to create a more inclusive workforce.

## Community Partners of the Inclusive Employment Program (2018/19):

- CSE Consulting – Brockville, Kemptville and Prescott
- Leeds and Grenville Addictions and Mental Health – Brockville
- St. Lawrence College – Community Integration through Co-operative Education Department – Brockville
- TR Leger School of Adult, Alternative and Continuing Education – Brockville
- Developmental Services of Leeds and Grenville – Brockville

## Program Framework

Through the Inclusive Employment Program, job seekers with a broad range of disabilities can access intake and assessment professionals, connect with services to address immediate needs, such as health, housing or financial services, and can be referred to the program detailed below:

**Phase 1:** Functional Assessment carried out by Career Services includes specialized program modules such as: Industry Work, Employer Tours and Job Tasting.

**Phase 2:** Pre-employment in-class training conducted by EEC, includes education on financial literacy, interview and soft skills, job exploration, Dress for Success, support with various training certifications depending on the employment goal of the job seeker.

**Phase 3:** Job Trial/Working Interview is facilitated by both Career Services and EEC if client requires this support.

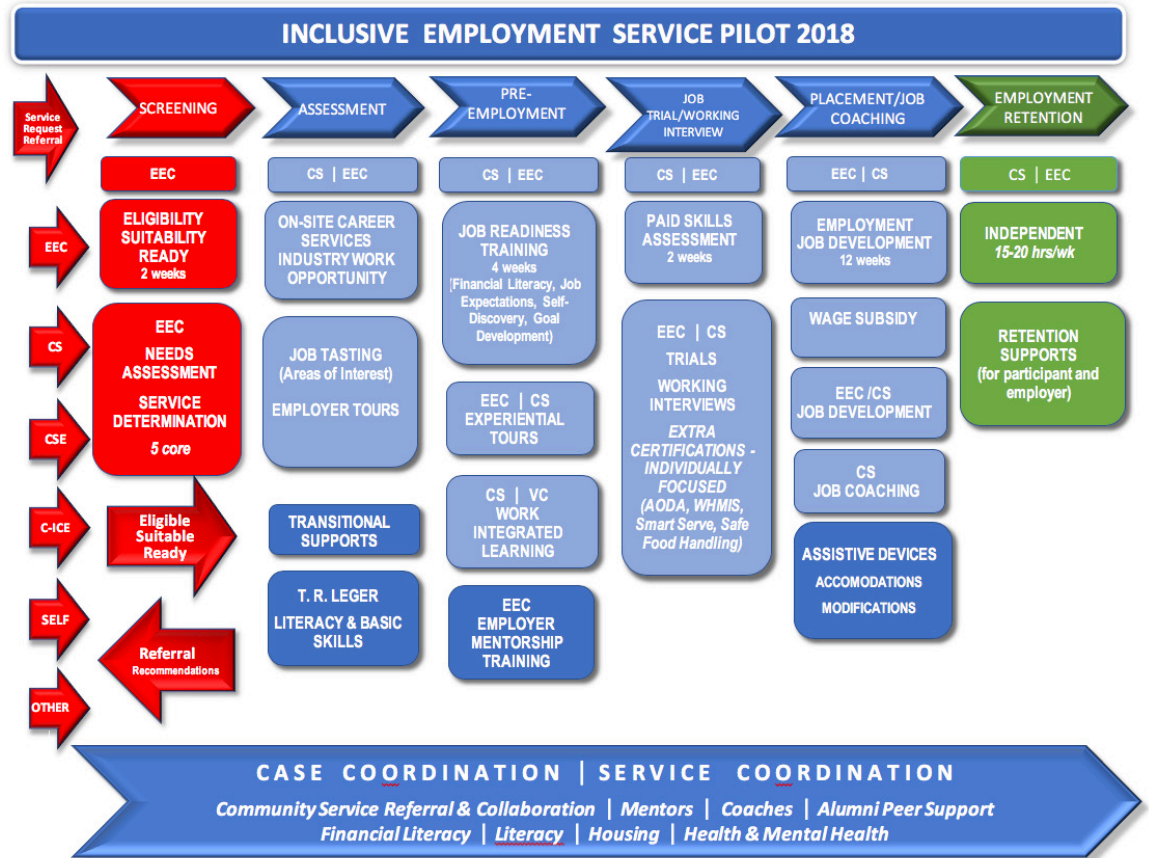
**Phase 4:** Job Development/Placement with community employers. Job development is shared between Career Services and EEC, resulting in more options for job seekers and faster matches for businesses. Once employed, there is up to 12 weeks of job coaching and intensive supports delivered by Career Services.

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**Phase 5:** Employment Retention and follow-up is shared between the two main partners, Career Services and EEC, which includes development of a retention-support plan to ensure long-term success.

## Case Study #2: Client Pathway

The image below shows the client pathway for the Inclusive Employment Program case study, courtesy of Career Services and Employment + Education Centre.



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## Case Study #3

### Impact of School-Employment Service Provider Partnership on Employment Outcomes for Youth who have a Disability

#### Introduction

It is well documented that community partners can help schools prepare students for college, career, employment, and citizenship by offering additional opportunities, supports, and enrichment for young people. These types of partnerships are critically important for communities supporting youth who have developmental and intellectual disabilities.

According to the findings from ODEN's Youth Success Strategy for the Developmental Sector, the research found that where there is intentional collaboration between education providers, employment service providers, and employers, youth who have developmental disabilities have greater access to skill development and opportunities necessary for successful employment outcomes. And while the research found that current funding models and policies have created barriers for success in youth who have intellectual disabilities, some communities are finding innovative and practical ways to collaborate to remove these. This is the case for the communities of Essex County and Windsor.

The following is a case study illustrating the partnership established between Community Living Essex County, Community Living Windsor, and their regional school boards to support the delivery of the jobPath curriculum in their Special Education classes, encourage summer employment and to engage youth and their families in conversations about employment well before graduating high school. In establishing these relationships, the stakeholders created a collaboration that ensures students are accessing and developing employability skills during their school years. Also, the employment service providers have an opportunity to get to know the students before they leave the educational system. This allows for a person-centred employment preparation approach that better supports employment outcomes for these communities.

#### Understanding the Need for Partnership

In the late 1990s, in the community of Windsor, Ontario, families of children and adults who have a developmental disability were dependent on a program called "Work Matters" to help their children learn employability skills. The Windsor-Essex Catholic District School Board ran this program within their Adult Education Centre until 2017.

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But according to employment service providers in the community, Work Matters did not result in high success rates, and the students were not achieving meaningful employment after graduation. Furthermore, its funding was coming to end in 2017.

To help support some of the families who depended on Work Matters, Community Living Windsor offered “[Work for All](#)” as an alternative. Work for All is an employment skills training program offered then, and offered now, hand-on opportunities for people who have an intellectual disability.

In April 2015, Community Living Essex County, together with Community Living Windsor, partnered together to create a diverse and inclusive workforce across Essex County: **First Choice-Employment** project. Branching from the First Choice-Employment Steering Committee, three working groups carried the project goals.

One of the first things the steering committee did was establish an educational sub-committee called the **Strengthening Relationships Subcommittee** which had representation from both school boards, Workforce Windsor-Essex, St Clair College’s Community Integration through Cooperative Education (CICE) Program, Community Living Essex County, Community Living Windsor, Student Links (Community Living Ontario). This subcommittee would evaluate how well employment services were connecting with schools. This committee advocated to promote jobPath (then known as JobStart) to every secondary school in the region.

## **Building Employment Skills – Introducing jobPath.**

The education sub-committee had become familiar with jobPath, a pre-employment curriculum designed for people who have an intellectual disability to gain employment skills. They coordinated jobPath training with Community Living Sarnia, the creators of the jobPath curriculum and the associated resources. Teachers and special education coordinators from the local school boards in Windsor and Essex were trained.

jobPath is a six-week curriculum designed to help job seekers learn more about their own interests, strengths, and skills. The curriculum is a combination of in-class activities, guest speakers and workplace tours in the community. Community Living Essex County uses the material as part of their services through their Career Compass Employment Services.

Community Living Essex County’s first in-person jobPath was facilitated in 2017. That same year, they launched *Youth in Action: Summer Work Experience* which began as a pilot project to develop and promote summer employment opportunities for youth returning to school, utilizing the jobPath curriculum as a tool in the first three days of the summer employment program. This was based off successful practices across the sector, and from the feedback received from families and educators.

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## Putting Theory to Practice

Since 2017, 70 students have gone through Career Compass' Youth in Action summer employment program. They have seen a gradual increase in the number of students who have a disability accessing the Youth in Action program AND the number of graduating students, leaving the education system, wanting to receive employment supports. CL Essex County credits the intentional and increased presence inside the school as leading to the increase in the overall number of youth seeking out employment supports. Participation during the COVID-19 pandemic has been challenging but has continued. Community Living Essex County has obtained feedback from the partner school boards to describe the importance of this collaboration:

Maggie Ducharme who is the Special Education Department Head at St. Thomas of Villanova described *"we have had an excellent partnership for many years with CLEC and the jobPath for a number of years. They have done their program both in person and online for our students. Several of our students have received support with the summer jobs program as well. We have also had students gain full time employment after high school through their association with the program."*

The support that CL Essex County provides the students is important and families recognize that. According to Ms. Ducharme *"families appreciate the individual approach taken with each student to discover their strengths and their areas of need as well."* And when it comes to the value of the partnership, Ms. Ducharme says *"We value the partnership we have dealing with such caring and professional staff. It is evident how much they care about our students and their future plans for success."*

Chad Barrette, Vice Principal of St. Ann Secondary School described how *"I had the fortunate experience of having Tammy come into my Life Skills classroom over the period of two semesters to facilitate jobPath lessons, one was in person and the other was virtually. She was personable and happy and connected very easily with the students. She gave many lessons on job readiness skills and made them hands on and at the learning level of the students. She really knew how to scaffold the lessons so that she could take the students to the next level and was sensitive as to not make the students feel centered out."*

Mr. Barrette comments on the ability of the Career Compass staff to work with students and staff alike in a matter that was composed and professional. He indicates that the school appreciates the ability of the service provider to improvise when technology does not work but most importantly how to work well with students: *"Our students really liked jobPath; they learned many soft skills that do not come naturally for many in the class. We practiced over and over again the soft skills and saw a few videos of students in Life Skills Co-op all over Essex County performing jobs that our students came to see as possible for them. Through Tammy, the students began to see themselves as part of a community that uses the skills that they have to empower themselves to become more independent members of the community."*

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## Addressing Issues and Concerns

Like any partnership, the collaborations that Community Living Essex County and Community Living Windsor have created have experienced some challenges. But together, they worked on solutions.

Some schools were unsure about hosting an employment specialist (external resource) in the school and having them work alone with students. One of the ways they overcame this challenge was to have a teacher present in the classroom to help support and supervise.

They also found that the jobPath curriculum was not a good fit for all students. Some students chose not to continue with the program because through the process of self-discovery they identified that employment wasn't their main goal at the time. The jobPath program was offered off-site (not in the school) offering a neutral location, but for some students participating, transportation was a barrier for their involvement.

As noted previously, the COVID-19 pandemic brought some significant challenges to programs across all sectors and partnerships with schools to deliver the jobPath curriculum was not the exception. The virtual delivery of the curriculum did not have the same impact as when it was delivered in person. And despite the challenges, CL Essex County and three schools were able to work together to re-work the curriculum to allow it to be delivered as effectively as possibly virtually.

Angela Staley-Klassen, a Special Education Coordinator with the Windsor Essex Catholic District School Board emphasized the value of the partnership when she said, *"the partnership and collaboration between Community Living Essex County and the WECDSB has been a truly rewarding experience. Our students are provided with multiple highly engaging hands-on and virtual opportunities to prepare for employment. Thanks to the partnership, our students are able to practice pre-employment skills with the guidance of the jobPath facilitator, apply these skills through school co-op experiences and bridge into more permanent employment once they graduate."*

## Promoting Partnerships Beyond Essex County – Community of Practice

To further support this partnership and jobPath ODEN launched the jobPath [Community of Practice](#) (CoP) with 10 (ten) organizations across the province. Member of this CoP come together to support and learn from one another by creating resources and sharing promising practices that will strengthen their knowledge and skill using the jobPath curriculum.

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## Case Study #4 – Partnership & Collaboration 2021-2022

### Canadian Network Supporting Inclusive Public Service Employment (CNSIPSE)

#### Introduction

The following case study on partnership has been conducted by the Ontario Disability Employment Network (ODEN) with interviews and materials from LiveWorkPlay. This case study documents the inspiration, process behind, and learnings from the Canadian Network Supporting Inclusive Public Service Employment (CNSIPSE). CNSIPSE is a national partnership network of, to date, eight (8) organizations committed to improving employment opportunities in the federal public service for people who have a disability.

CNSIPSE was founded by LiveWorkPlay, an Ottawa-based charitable organization serving people with intellectual disabilities and autistic persons in community life and employment. Funded primarily by the Ontario provincial government, the work of the community team is funded under the auspices of the Ministry of Children, Community and Social Services while the employment team is funded by the Ontario Disability Support Program.<sup>1</sup>

Their work developing relationships with, and facilitating accessible, equitable hiring practices within the federal public service are documented in their case study “Making Employment Within the Public Service of Canada Accessible and Successful for People with Intellectual Disabilities.” The broad strokes of that case study are excerpted here:

*This case study chronicles a unique Inclusive Employment Initiative for people with intellectual disabilities and/or autism, designed and implemented by a community organization, LiveWorkPlay. This employment initiative features a targeted recruitment program with customized employee, supervisor, and organizational supports, which collectively demonstrate an accessible employment model for the federal Public Service of Canada.*

*The diversity found within the disability community is clearly illustrated by people with intellectual disabilities. With an inequitable employment rate of under 20 percent, people with intellectual disabilities are the most marginalized and vulnerable among us in Canada and historically have been severely under-represented in the federal Public Service. Yet, this remarkably diverse population also represents untapped potential as a largely available workforce whose inclusion brings creativity, innovation, and loyalty to their teams and yields wide-ranging benefits for employers, the economy, and all Canadians.*

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<sup>1</sup> Ontario Disability Support Program: <https://www.ontario.ca/page/ontario-disability-support-program>

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*Aligning with the recently passed Accessible Canada Act, especially the employment pillar of the Act, the Public Service Accessibility Strategy, as well as the innovation objectives of Public Service Renewal, Blueprint 2020, this employment initiative demonstrated the successful recruitment and hiring of 95 individuals as of December 31, 2019.”<sup>2</sup>*

We encourage you to visit <https://liveworkplay.ca/psc-case-study-2021> to access the study, and to learn more about the early stages of this inclusive employment initiative.

ODEN's case study looks at how the processes and learnings from the initiative done by LiveWorkPlay were translated into a national partnership network. The case study documents the decision to form the CNSIPSE and the pathway to its establishment.

## Background

Located in Ottawa, LiveWorkPlay is especially aware of the underrepresentation of people who have a disability in federal roles. They felt the Government of Canada was long overdue for a change in its hiring practices for people who have a disability. They wondered what it would take to create an accessible, equitable, and disability-conscious hiring protocol with the Federal Public Service. They began their Inclusive Hiring Initiative, “Making Employment Within the Public Service of Canada Accessible and Successful for People with Intellectual Disabilities.”

The initiative began with identifying critical areas in need of improvement within the Federal Public Service. Next, it focused on creating opportunities and pathways to employment for people who have a disability. LiveWorkPlay worked with the Public Service to identify and eliminate barriers to employment. They helped strategize ways to make the Public Service of Canada a plausible and accessible employment prospect for people who have a disability. This strategic initiative and collaboration resulted in promising employment outcomes for job seekers who have a disability. At last reporting, 145 people were recruited and hired.<sup>3</sup>

The specific pathway through this initiative is detailed in LiveWorkPlay's own case study. In addition to their published case study, LiveWorkPlay also shared their early successes with this initiative at the Canadian Association for Supported Employment's (CASE) annual conference held in Montreal in 2019 and updated at the Disability and Work Conference 2021.<sup>4</sup>

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<sup>2</sup> LiveWorkPlay, “Making Employment Within the Public Service of Canada Accessible and Successful for People with Intellectual Disabilities,” LiveWorkPlay: Ottawa, April 2020, 4. <https://liveworkplay.ca/wp-content/uploads/2021/03/LiveWorkPlay-PSC-Case-Study-2021.pdf>

<sup>3</sup> Information updated by Anna Nelson of LiveWorkPlay via email, February 2022.

<sup>4</sup> Panel discussion from the Disability and Work in Canada Conference (online) of December 2, 2021 <https://www.youtube.com/watch?v=KthjZnQxmk>

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LiveWorkPlay’s forward-thinking approach to employment caught the attention of like-minded organizations, and it soon became apparent that there was an opportunity to take this regional, organization-specific initiative to a national level. The seeds of partnership were sown.

## What is Partnership?

ODEN’s Partnership Guidebook defines partnership as: “A relationship where two or more parties, having common and compatible goals, agree to work together for a particular purpose and/or for some period of time.”<sup>5</sup> In the case of LiveWorkPlay and the members of CNSIPSE, they have a shared and focused goal of increasing employment opportunities for people who have a disability in the Public Service. People who have a disability are underrepresented in the workforce. Their talents are too often overlooked, and their employment needs are frequently misunderstood. As such, there are countless organizations across the country working to find effective and innovative ways to support people who have a disability to achieve their employment goals. Working together with organizations with similar goals but with unique skills and resources can make for a more robust and successful experience.

## Why Partner?

Simply put, partnership makes true the adage “many hands make light work.” Resource and knowledge-sharing among partners can improve organizational effectiveness and service capacity, thereby increasing employment outcomes for people who have a disability. “In the Employment Service Sector, service providers can work with other organizations to increase organizational effectiveness and improve organizational efficiency. When you collaborate or partner for the benefit of job seekers and businesses in your community, you are focused on organizational effectiveness, and efficiencies are naturally created along the way.”<sup>6</sup>

Employment service providers are under pressure to achieve employment outcomes in challenging job markets, using limited resources. When LiveWorkPlay identified opportunities for employment in the Federal Public Service, and they developed a sustainable system for ensuring equitable and accessible hiring practices for people who have a disability, their colleagues took notice. Employment service providers throughout Canada recognized opportunities in public service sectors in their own provinces and territories. They knew they could benefit from the experiences of LiveWorkPlay. Likewise, LiveWorkPlay realized they could have a greater impact on employment outcomes by helping other organizations to replicate their

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<sup>5</sup> Ontario Disability Employment Network, Partnership Guidebook, 2019, 3.

<sup>6</sup> Ontario Disability Employment Network, Partnership Guidebook, 2019, 3-4.

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employment model. A partnership, in this case, helped to validate, promote, and expand the work that LiveWorkPlay was doing with the Federal Public Service, while also helping employment service organizations across Canada pursue new employment pathways.

Another benefit to partnership that LiveWorkPlay identified was the ability to socialize the core concept of their initiative. Canadians who have a disability should be represented in all aspects of Canadian life, including federal employment. Representation matters.

LiveWorkPlay recognized that the more employment service providers and federal employers bought into this concept, the more Canadians would come to expect people who have a disability be employed in all sectors. It was not just about individual employment outcomes. It was about creating a cultural shift in expectations.

## Starting the Process of Partnership

LiveWorkPlay began to explore the potential for an inclusive employment strategy back in 2014. A part of that exploration included the formation of the Federal Employment Strategy Group (FESG). Described as “a strong team of champions, which functions together as a powerful and resourceful vehicle for knowledge transfer”, the FESG is a coalition of stakeholders dedicated to investigating, informing, and upholding inclusive hiring practices in federal service.

The FESG helped shape the inclusive employment model developed by LiveWorkPlay, and the working group continues to support the principles and practices of the model. In their case study, LiveWorkPlay notes, “The FESG shares experiences and enables real-time learning and best practices...This informal group, a ‘coalition of the ‘willing’, continues to exist, progress, and provides an excellent example of an empowered workforce.”<sup>7</sup> In other words, collaboration and informal partnerships were at the heart of LiveWorkPlay’s Inclusive Employment Initiative from its early days.

By 2019, LiveWorkPlay had a clearly defined model for inclusive hiring and demonstrated successes with that model. The following year they published their case study, and they began strategizing ways to extend the initiative’s benefits. LiveWorkPlay wondered: How do we support and share what we have learned beyond our organization? Given the demands on social services organizations, LiveWorkPlay knew that they could not support job seekers across the country. However, they also knew that great organizations existed throughout the nation that could take up the baton of the work LiveWorkPlay began, if they had the proper structure and guidance.

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<sup>7</sup> LiveWorkPlay, “Making Employment Within the Public Service of Canada Accessible and Successful for People with Intellectual Disabilities,” LiveWorkPlay: Ottawa, April 2020, 3. <https://liveworkplay.ca/wp-content/uploads/2021/03/LiveWorkPlay-PSC-Case-Study-2021.pdf>

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Developing a partnership network struck LiveWorkPlay as the most practical way to provide a framework to take the tools they had developed for the Federal Public Service initiative, and to share them with interested employment services organizations across the country. Even if they had the capacity to lead this initiative all on their own, LiveWorkPlay understood that there would be some region-specific factors to consider and that engaging local service providers in the process would ensure the best, most appropriate supports for job seekers.

LiveWorkPlay wanted to ensure consistency in service quality and expectations. A job seeker interested in working for the Public Service in Winnipeg should be able to count on the same standards of support and accessibility as a job seeker in Montreal, or in St. John's. Likewise, Public Service employers throughout Canada should count on well-informed service providers and well-prepared job seekers. Partnership offered the semi-formal process necessary to create a national standard and create a network of organizations accountable to each other and those standards.

In recruiting partners for CNSIPSE, LiveWorkPlay put feelers out for organizations across the country looking to replicate and promote their federal hiring initiative. The logic behind and outcomes from LiveWorkPlay's Federal Public Service employment initiative were so well-received that, in some cases, LiveWorkPlay was approached directly by interested organizations who wanted support in launching their own versions of the initiative. It was not long before a coalition of seven (7) organizations representing CNSIPSE was formed. The coalition included LiveWorkPlay, Avalon Employment, TEAM Work Cooperative, Action main-d'oeuvre, Community Living Mississauga, Gateway Association, and Semiahmoo House Society (Wise Employment Solutions). Alberta, British Columbia, Newfoundland, Nova Scotia, Ontario, and Quebec were represented in this first phase of the coalition.

## Operationalizing Partnership

Though the value of partnership in expanding the benefits of their Federal Public Service initiative was apparent to LiveWorkPlay early on, they wanted guidance to ensure they were competent in their approach to partnership. When initial interest in partnership began to generate, LiveWorkPlay hired an external consultant to help them move forward with the strategic process. This was thanks to a grant LiveWorkPlay received from Innoweave. Mike Coxon of Third Sector Consulting assisted LiveWorkPlay in developing a maximum impact strategy to expand their partnership network.

Regarding the resources needed to establish CNSIPSE, LiveWorkPlay explained that people power was the primary resource. The partnership needed a coalition of enthusiastic staff to commit to the Inclusive Hiring Initiative's goals and contribute their experiences and ideas to the partnership.

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External funding to support CNSIPSE and its members has not been made available. Therefore, regular internal staff in the partner organizations are leading the movement for inclusive hiring in the Federal Public Service, with support from their fellow members in CNSIPSE. LiveWorkPlay explained that additional funding to support onboarding dedicated staff to the Inclusive Hiring Initiative would be ideal. However, they are making do with the network of support that the partnership offers.

Once the strategic plan was in place, LiveWorkPlay formally launched the CNSIPSE in the Winter of 2020. By the Spring of 2021, the first six (6) organizations to join the partnership had signed their memoranda of understanding, and the partnership was official. Invitations to attend the first meeting of the CNSIPSE were sent out soon after, and the CNSIPSE convened for the first time in May of 2021. A second meeting of the partners was held in November 2021. Since then, employment services organizations wishing to join the network have had the opportunity to review its mandate and decide if they would make suitable partners.

Before onboarding new partners, LiveWorkPlay asks potential partners to consider if their organization has the capacity to support the inclusive hiring process and to see it through. While the goal is to have as many employment service organizations and federal employers take up this initiative as possible, the initiative is only as successful as its supporters are dedicated. LiveWorkPlay recognizes that different employment models, funding structures, and organizational cultures might present challenges to carrying out the work of the Inclusive Hiring Initiative. Therefore, LiveWorkPlay has been mindful of who has been invited to join CNSIPSE. To date, one (1) additional organization has joined the partnership (SCE Lifeworks in Manitoba) for a total of eight (8) members. The hope is to continue to expand the partnership, but not at the expense of it functioning effectively. Expansion will be strategic.

## Moving Forward

In terms of CNSIPSE's future, LiveWorkPlay recognizes it is a delicate balance between growing the network and keeping it manageable. The strength of the partnership depends on an alignment of values, commitment, and focus. At this stage, the main goal is to hone the strengths of the partnership. It is in its early stages, and LiveWorkPlay is focused on guiding the partners through working out kinks in the process, getting some hires under their belt, and refining and proving the method of the Inclusive Hiring Initiative. Naturally, LiveWorkPlay wants representation from all provinces and territories in the CNSIPSE membership. Inclusivity and representation are the goals of the Inclusive Hiring Initiative, after all. It is only logical that would be reflected in CNSIPSE's partners. The partnership will grow as needs and opportunities for expansion arise.

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Now that establishing the partnership is complete, the conversations among partners have shifted to solidifying shared goals, defining expectations, and sharing successes as an unfolding process. CNSIPSE was conceived as a supportive, action, and results-oriented network. To that end, LiveWorkPlay has developed checklists for success and resources to support its partners. It is important that consistency in expectations and quality of service is maintained. That said, they know that flexibility and individuality are important. The Inclusive Hiring Initiative is a person-centered employment model. The unique abilities of the service provider, the needs and goals of the person supported, and the needs of the employer are important to consider. Complete standardization is not the goal moving forward. Consistency of service quality and positive employment outcomes are foremost.

LiveWorkPlay has been encouraged by the realistic, honest, and productive conversations from the CNSIPSE partners. They acknowledge that each partner is at a different stage of the process, bringing different approaches to the table. The openness among the partners has allowed LiveWorkPlay to continually take stock of their employment model, and to enhance it based on new learnings and feedback. They note that it is necessary to be realistic, flexible, and humble in the early stages of what they hope will be a sea change in employment for Canadians who have a disability.

## Lessons Learned

LiveWorkPlay has learned that there is no magic formula to a successful partnership. As the partnership grows and changes, so too will the needs of its members. The ingredients that have contributed most positively to CNSIPSE's success so far include alignment of vision and values, shared commitment among partners, strategic planning, flexibility, managing expectations, and a culture of openness.

At the most recent meeting of the partners, conversations around what a successful partnership looks like took place. Questions were asked such as: What does a fair partnership look like? What are the collective responsibilities of the partnership? What are the individual roles and responsibilities of partners? How do we as a collective remain accountable and uphold expectations? How do we maintain equal interest and commitment? What are reasonable and relevant data to collect from partners?

Over the next few months, CNSIPSE will be working to answer these questions, and to establish a more defined framework for the partnership with the support of their consultant. LiveWorkPlay will also be mindful of its role in guiding the partnership. They acknowledge that there is a delicate balance between sharing their knowledge and experience with the partners and “hand-holding” them through the process. The goal of the partnership is reciprocity. Ultimately what LiveWorkPlay wants is a self-sustaining inclusive employment model for government employers. CNSIPSE is a means to establish, socialize, and spread that model across Canada.

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## Key Takeaways

For LiveWorkPlay, the key takeaway from their Inclusive Hiring Initiative and the partnership that followed is that they are changing the world of work. They acknowledge that there are multiple perspectives on employing people with disabilities from various stakeholders. They note that there is the charity or 'do-gooder' case, the business case, and the rights-based case for employing people who have a disability. Through their Inclusive Hiring Initiative, LiveWorkPlay hopes to shift the conversation from these perspectives to one of inclusion and representation.

People who have a disability represent a significant portion of Canadian society. Their skills and contributions should be reflected in the world of work at the same rate people who have a disability are represented in the general population. LiveWorkPlay believes that including people with disabilities in the Federal Public Service is an ideal forum to promote this expectation. Federal agencies should represent the people they serve, and this includes people who have a disability. By modeling inclusive employment, federal employers are starting a call to action for provincial and municipal employers, and indeed all other employers across Canada.

Despite the many challenges wrought by COVID on the world of work, LiveWorkPlay sees this as a unique time to be thinking differently about employment and what is possible. COVID has demonstrated that flexible work is important to all workers, regardless of ability.

Creativity and flexibility support accessibility. COVID has demanded a shift in how we think about work. Now is the time to seize that moment to ensure all future conversations about work include people who have a disability.

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## WORKSHEETS AND RESOURCES

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## Resource 1: Organization Self-Reflection Worksheet (page 1 of 4)

Prior to entering into a partnership or collaboration for greater service delivery, gather your Employment Service team members and explore your answers to the following questions. This will help create awareness of what strengths and needs your Employment Services has, what your clients are getting from your current service, and where you can work most effectively with other organizations to increase success for your clients, as well as your organization overall.

### 1. What Employment Services do we deliver well?

**RECORD YOUR ANSWERS.** Provide as much detail as possible. Use additional pages if you require more space

**RECORD ANY NEXT STEPS.** Note any necessary follow-up and date to be completed by.

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## Resource 1: Organization Self-Reflection Worksheet (page 2 of 4)

### 2. What employment services could we deliver better?

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

### 3. Where are our clients succeeding?

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

### 4. Where are our clients failing to succeed?

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

## Resource 1: Organization Self-Reflection Worksheet (page 3 of 4)

**5. What organizations do we already collaborate with either formally or informally?**

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

**6. What organizations could help us provide better Employment Services in our area?**

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

**7. Why do we want to partner with another organization? How does it benefit us?**

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

## Resource 1: Organization Self-Reflection Worksheet (page 4 of 4)

### 8. What do we have to offer another organization in a partnership?

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

### 9. What sources of funding do we have access to?

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

### 10. Is our organizational leadership aware of our intention to work with another organization to deliver improved service?

RECORD YOUR ANSWERS.

RECORD ANY NEXT STEPS.

**Resource 2: Partnership Questions – a conversation guide**  
**when starting to explore a partnership** (page 1 of 4)

**RATIONALE**

Why do we want to partner?

What are the benefits of working together as partners?

**IMPACT**

What do we want to have happen as a result of working together?

What will the partnership’s impact be on our clients?

What will the partnership’s impact be on our programs?

**Resource 2: Partnership Questions – a conversation guide when starting to explore a partnership** (page 2 of 4)

What will the partnership’s impact be on our organizations ?

What other impacts are possible as a result of this partnership?

**GOALS**

What are our partnership goals?

How will we know when we have achieved our goals?

**VALUE**

Is the outcome worth the expenditure of effort and other resources?

**Resource 2: Partnership Questions – a conversation guide when starting to explore a partnership** (page 3 of 4)

How will we be more effective when we work together?

What efficiencies will working together create?

**ALTERNATIVES**

What best practices do we want to follow when working together?

If we make mistakes, how will we learn from them and avoid them in the future?

**Resource 2: Partnership Questions – a conversation guide**  
**when starting to explore a partnership** (page 4 of 4)

**NEXT STEPS**

Who needs to be included to help move this partnership forward?

When do we want to start working together?

## Resource 3: SWOT Analysis



## Resource 4: Selection Matrix to Identify and Choose Partners & Collaborators

(page 1 of 7)

The following is a tool that can be used to identify how a project lead can objectively rank potential partners to involve in their project. To fill out the matrix, you will need to do some research and collect information on your potential partner organizations. The tool can also be use as background information to satisfy funder needs and requirements to demonstrate accountability and that a process has been used to determine partners in a project.

### How to use this tool

The tool is divided in four sections:

**Section 1 – The Background:** This is a section for the Project Lead to describe why this tool is needed! This description gives the reader an indication for the need to choose among interested partners.

**Section 2 – Selection Criteria:** This is a section for the Project Lead to describe what is the criteria that will be used to evaluate which organization would be best to partner based on the needs of the project. Keep your selection criteria to about 3 to 5 items.

**Section 3 – Selection Ranking:** This section describes the three ranking levels used to objectively identify how an agency matches the selection criteria in section 2. Levels indicate “no alignment to criteria” (a ranking equal to 1), “some alignment to selection criteria” (ranking equal to 3) and finally “full alignment to selection criteria” (a ranking equal to 5).

**Section 4 – Selection Matrix:** This is where the Project Lead will enter the information collected through research and discussions that supports the ranking level based on the selection criteria. Add the ranking numbers. The highest number is the organization best suited to be a partner in the project.

This tool was first developed when ODEN was evaluating partners to bring to the Canadian Youth Success Strategy. That project is used as an example of how to fill out the selection tool. Names and website references have been removed to generalize the tool.

*At the end of the example, you will find a fillable template for you to use.*

## Resource 4: Selection Matrix to Identify and Choose Partners & Collaborators

(page 2 of 7)

### EXAMPLE – ODEN’s Canadian Youth Success Strategy (YSS)

#### 1.0 Background

The YSS project funded by the CASE Innovation Lab used a “Train-the-Trainer” approach to train family networks in communities in Western, Central, and Eastern Canada.

ODEN identified a main collaborator to promote and support the project and reach family networks:

**Agency A.** Agency A was an organization with relationships to family networks in the regions targeted. They have a strong commitment to promoting inclusion with a number of stakeholders including educators and businesses.

Six organizations in ODEN’s ecosystem were approached to support the project. They are labeled as Agency A, B, C, D, E and F in this example. This matrix was used to demonstrate objectively which agency would be a partner in the project based on the project needs.

#### 2.0 Criteria to select a Project Partner

ODEN developed criteria to identify a partner connected to stakeholders who best aligned so that the following project performance indicators could be achieved:

- i. 3 family network organizations trained.
- ii. 9 ESPs/Educators trained on jobPath Employment Discovery Curriculum.
- iii. 100 individual businesses engaged and provided access to online DACT training.
- iv. 20 young people who have a disability engaged. Minimum 12 of them connected to employment (4 people per region).

## Resource 4: Selection Matrix to Identify and Choose Partners & Collaborators

(page 3 of 7)

### To evaluate which partner to select, the following criteria was used:

#### A) REACH

The project was NATIONAL in its scope. ODEN needed a collaborator with relationships and networking reach across Canada.

#### B) DIRECT CONNECTION TO FAMILIES

The project evaluated the theory that families can advocate effectively at a local level for the importance of higher expectations for students who have a disability. The project evaluated how employment was a viable option when tools and resources were provided to employment service providers, businesses and other stakeholders.

Therefore, ODEN looked for a partner with close connections to family networks so that the Train-The-Trainer workshops were delivered in BC, MN, and NS.

#### C) DIRECT CONNECTION TO OTHER STAKEHOLDERS – EDUCATORS AND BUSINESSES

The project created awareness of the importance of higher expectations and employment as a goal after leaving school for students who have a disability among other stakeholders. These stakeholders included educators, employment services, and businesses.

#### D) POSITION ON EMPLOYMENT

A strong position to promote employment as an outcome for youth who have a disability was required for agencies approached. Evidence was found in website, position statements, etc.

### 3.0 Selection Ranking

Table 1 provides information on how ODEN selected **Agency A** as the main collaborator and partner for this project. A ranking system was provided to objectively identify how each organization approached met the needs of the project to achieve the performance outcomes.

#### The ranking levels are:

- “1” minimal alignment,
- “3” some alignment,
- “5” strong alignment to criteria in section 2.0.

## Resource 4: Selection Matrix to Identify and Choose Partners & Collaborators (page 4 of 7)

Organization	Reach	Connection to Families	Connection to Educators	Connection to Businesses	Position on Employment	Ranking: add each ranking in yellow [Maximum 25]
<b>Agency A</b>	National Ranking = 5	Network of community groups with strong connection to family networks across the country . <b>Agency A</b> has hosted ODEN in the past to promote the YSS Project workshops. Ranking = 5	Actively engaged with educators, providing a dedicated resource hub. <b>Agency A</b> has an active role in promoting inclusive education throughout the country. Ranking = 5	<b>Agency A</b> has a partnership with LinkedIn Canada and launched an employment initiative. This collaboration will be leveraged to promote the DACT training available in the project. Ranking = 5	<b>Agency A</b> has a strong position to promote employment for people who have a disability. Employment is a key pillar for <b>Agency A</b> . They have created an Employment Position Statement, have a dedicated webpage on Employment and have made supporting <b>job seekers</b> and <b>employers</b> part of their Four Strategic Priorities as most recently noted in their Annual Report Ranking = 5	<b>25</b>
<b>Agency B</b>	National Ranking = 5	Family engagement with a focus on a health, medical, and research. <b>Agency B</b> promoted and hosted the YSS workshops (2020-2021) in their Family Research series. While they engage with families, they do not have a formal network of family groups. Ranking = 3	<b>Agency B</b> does not have a direct connection to educators. However, they do provide resources that educators can utilize when considering how to accommodate a student in school from a diagnosis perspective. Ranking = 3	<b>Agency B</b> does not have direct connection to businesses. Ranking = 1	<b>Agency B</b> does not have a position statement or offer resources to promote Employment. Ranking = 1	<b>13</b>
<b>Agency C</b>	National Ranking = 5	<b>Agency C</b> is committed to changing systems impacting youth ability to thrive in the workforce and they do so by engaging players in the youth workforce network. <b>Agency C</b> promoted the YSS Workshop in their Annual National Youth Summit However, they do not have a direct connection to family networks. Ranking = 1	<b>Agency C</b> does not have a direct connection to educators. Ranking = 1	<b>Agency C</b> has access to a network of businesses. <b>Agency C</b> would be able to promote the DACT training available for this project. Ranking = 5	<b>Agency C</b> has an interest in promoting employment for youth facing barriers. However, youth who have a disability have not been an intentional group. Ranking = 3	<b>15</b>

## Resource 4: Selection Matrix to Identify and Choose Partners & Collaborators (page 5 of 7)

Organization	Reach	Connection to Families	Connection to Educators	Connection to Businesses	Position on Employment	Ranking: add each ranking in yellow [Maximum 25]
<b>Agency D</b>	Provincial but with connections across Canada <b>Ranking = 3</b>	<b>Agency D</b> has been connecting to post-secondary educational institutions to promote Assistive Technology (AT). They have an interest in promoting Youth Employment.  They do not have direct connection to families or family networks but are connected to other stakeholders in the Employment Service. <b>Ranking = 1</b>	<b>Agency D</b> has working relationships with post-secondary education institutions to promote their AT tools. However, the project is aimed to create awareness for educators at high school level. <b>Ranking = 3</b>	<b>Agency D</b> is connected to businesses across Canada as an Employment Service Provider.  This connection will be leveraged to promote the DACT training available in the project. <b>Ranking = 5</b>	As an Employment Service Provider, <b>Agency D</b> have a strong position regarding employment for youth who have a disability. <b>Ranking = 5</b>	<b>17</b>
<b>Agency E</b>	Provincial <b>Ranking = 1</b>	<b>Agency E</b> is a provincial NFP organization committed to ensuring that individuals with intellectual disabilities and their families have the support they require to live full and inclusive lives in the community.  <b>Agency E</b> has facilitators who support families and individuals on aspects of inclusion including employment. They operate provincially. <b>Ranking = 5</b>	<b>Agency E</b> does not actively engage with educators.  They offer resources for parents to better advocate for inclusion in the education system. <b>Ranking = 1</b>	<b>Agency E</b> is connected to businesses in the province and will support the promotion of the DACT training for businesses. <b>Ranking = 5</b>	<b>Agency E</b> has a strong position regarding employment for youth who have a disability. <b>Ranking = 5</b>	<b>13</b>
<b>Agency F</b>	National <b>Ranking = 5</b>	<b>Agency F</b> promotes inclusion, encourages community participation and nurtures social health and connectivity for children, youth and adults, across Canada.  <b>Agency F</b> connects with families to provide programs that include a number of topics including education, employment, volunteering, exploring recreation and leisure, etc.  <b>Agency F</b> does not have a formal network of family groups but connects to families individually. <b>Ranking = 5</b>	<b>Agency F</b> does not actively engage with educators.  Their programs are directed to support people who have a disability. <b>Ranking = 1</b>	<b>Agency F</b> does not have direct connection to businesses. <b>Ranking = 1</b>	<b>Agency F</b> does not offer employment supports but has a strong position regarding employment for youth who have a disability. <b>Ranking = 3</b>	<b>15</b>

# Resource 4: Selection Matrix to Identify and Choose Partners & Collaborators

(page 6 of 7)

## 1.0 Background

Give a brief description for the need to choose among organizations, consider the needs of the project and what you will achieve by partnering with another organization.

## 2.0 Criteria to select a Project Partner

What criteria will you use to choose a partner? Think of your project goals as a guide for selection criteria. The criteria you choose will be the labels for your columns in Table 1.

## 3.0 Selection Ranking

**Table 1** provides information on how **NAME OF PROJECT LEAD ORGANIZATION** selected **NAME OF POTENTIAL PARTNER** as the main collaborator and partner for this project. A ranking system is provided to objectively identify how each organization approached can fit the needs of the project to achieve the performance outcomes.

The ranking levels are:

- “1” minimal alignment,
- “3” some alignment,
- “5” strong alignment to criteria in section 2.0.

## Resource 4: Table 1 – Selection Matrix to Identify and Choose Partners & Collaborators (page 7 of 7)

**Name of Project:**

Organization Potential Partners						Ranking [Maximum 25]



**Resource 6: MEMORANDUM OF UNDERSTANDING** (page 1 of 4)

**MEMORANDUM OF UNDERSTANDING**

**Between**

AGENCY LEGAL NAME AND DEPARTMENT/PROGRAM IF APPLICABLE:

[Empty rectangular box for agency name]

**and**

[Empty rectangular box for agency name]

**Purpose**

Be broad in your stated purpose. For instance, the purpose of this MOU is to collaborate on employment services and supports to better the outcomes for job seekers who have a disability.

[Large empty rectangular box for purpose statement]

**Resource 6: MEMORANDUM OF UNDERSTANDING** (page 2 of 4)

**Background**

- In paragraph 1, briefly describe the mission of Agency A
- In paragraph 2, briefly describe the mission of Agency B
- In paragraph 3, briefly explain why the two enter this Agreement.

## Resource 6: MEMORANDUM OF UNDERSTANDING (page 3 of 4)

### Responsibilities & Point of Contact

For each party, broadly indicate arrangements, funding, equipment, reports, etc. to be provided by whom, to whom, and by when. In other words, lay out the ground rules in a way that it is to be understood easily by most readers. In all cases, be specific enough to assure clarity but broad enough to accommodate real-world changes without having to re-draft the Agreement.

For point of contact use job titles (e.g. Program Manager, Employment Service Department) instead of names to keep document relevant when people leave position.

### Agency A – Responsibilities

### Agency A – Point of Contact

### Agency B – Responsibilities

### Agency B – Point of Contact

**Resource 6: MEMORANDUM OF UNDERSTANDING** (page 4 of 4)

**Duration of Agreement**

This Memorandum of Agreement will be in effect for \_\_\_\_\_ (usually one or two years) years from the date of last signature.

Approximately six months before expiration, both parties will meet to determine renewal, based on an assessment of the partnership’s results and achievements.

The Agreement may be terminated at any time upon written notification by one party to the other, with a minimum of \_\_\_\_\_ days i.e. 30, 60, or 90 days – leave enough time to ensure any clients are informed and proper alternate supports have been put in place for them.

**Signatories:**

[Empty rectangular box for agency name and title]

AGENCY NAME AND TITLE

[Empty rectangular box for agency name and title]

AGENCY NAME AND TITLE

[Empty rectangular box for signature]

SIGNATURE

[Empty rectangular box for signature]

SIGNATURE

[Empty rectangular box for date]

DATE

[Empty rectangular box for date]

DATE

## Resource 7: Partnership Agreement (page 1 of 6)

### Descriptions of what to include in key areas of a partnership agreement:

#### Partnership agreement between organizations

Provide legal name of each partner organization

#### Outcomes, Goals and Objectives:

Provide broad statements of what partners want to achieve. A work plan can be attached as an appendix to the agreement.

#### Partnership Values:

Describe values or principles that guide the relationships and work of the partnership.

#### Roles and Responsibilities:

Describe who will do what, who will be responsible for what, who will report to whom, and how the partnership and its activities will be managed. Think about individual partner's roles and responsibilities as well as any decision-making groups, such as committees and lead agency (Terms of Reference can be attached).

#### Resource Commitments:

Describe staff, facility and/or in-kind commitments.

#### Finance Commitments:

Detail the financial contributions of each partner or any other financial arrangements. A budget can be attached, if needed, as an appendix to the agreement.

#### Liability and Insurance:

Outline who is responsible for any liability and insurance for clients/participants and staff

#### Evaluation:

Specify how the partnership will evaluate identified outcomes. An evaluation plan can be attached as an appendix to the agreement.

#### Decision Making:

Specify a mutually satisfactory process for making significant decisions.

EXAMPLE: The Steering Committee will strive for consensus in all of its decisions. In instances where consensus is not possible, the Chair can request that an issue be put to a vote where each partner is entitled to one vote and a simple majority will decide the outcome.

#### Resolving Conflicts:

Specify a mutually agreed process to resolve conflicts and complaints.

EXAMPLE: When differences arise, the partners agree to: 1. Address their differences in a timely, open and honest manner. 2. Attempt to resolve issues at the staffing level at which they occur 3. Engage an independent mediator, if appropriate, to assess the partnership and/or the situation, either when required or as part of a formal evaluation.

#### Termination of Partnership or Partner Involvement:

Specify a mutually satisfactory process to terminate the partnership, or a partner's involvement in the partnership.

EXAMPLE: Partners will provide a minimum of three months written notice to the Steering Committee regarding their intention to withdraw from the partnership, and will complete any outstanding reporting and service delivery commitments. Instances where partners are not maintaining their commitment will be brought forward to the Steering Committee for discussion and conflict resolution if required.

In the event that partners acknowledge that their participation is no longer viable, partners can agree to dissolve the relationship, honourably and without acrimony, following discussion of the situation and alternatives to the current arrangement at the Steering Committee. Notice will be served in writing to all pertinent stakeholders.

#### In witness of this agreement the parties have executed below:

Provide legal names of each partner organization, signatures, and dates.

# Resource 7: Partnership Agreement (page 2 of 6)

## PARTNERSHIP AGREEMENT BETWEEN ORGANIZATIONS

LEGAL NAME OF EACH PARTNER ORGANIZATION

### Outcomes, Goals and Objectives:

### Partnership Values:

### Roles and Responsibilities:

**Resource 7: Partnership Agreement** (page 3 of 6)

**Resource Commitments:**

**Finance Commitments:**

**Liability and Insurance:**



**Resource 7: Partnership Agreement** (page 5 of 6)

**Resolving Conflicts:**

[Empty box for resolving conflicts]

**Termination of Partnership or Partner Involvement:**

[Empty box for termination of partnership or partner involvement]

**Resource 7: Partnership Agreement** (page 6 of 6)

**IN WITNESS OF THIS AGREEMENT the parties have executed below:**

LEGAL NAME OF EACH PARTNER ORGANIZATION

**Per its authorized signatories:**

SIGNATURE

SIGNATURE

NAME AND TITLE

NAME AND TITLE

DATE

DATE

## Resource 8: Additional Resources

<https://en.healthnexus.ca/sites/en.healthnexus.ca/files/resources/planningforpartnership.pdf>

<https://ctb.ku.edu/en/creating-and-maintaining-partnerships>

<http://thepartneringinitiative.org/wp-content/uploads/2014/08/Partnering-Toolbook-en-20113.pdf>

<https://www.unitedwaygt.org/wp-content/uploads/2021/06/2013-Collaborative-Partnerships-Toolkit.pdf>

<https://philanthropynewsdigest.org/features/the-sustainable-nonprofit/why-and-how-do-nonprofits-work-together>

<https://www.sparc.bc.ca/wp-content/uploads/2016/12/the-partnership-toolkit.pdf>



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