



Observatoire
québécois de la
proche aide

INTERSECTORAL COLLABORATION AND PARTNERSHIP FRAMEWORK

March 2024

En partenariat avec :

Québec 

CREDITS

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INTRODUCTION

BACKGROUND

The Quebec Observatory on Caregiving was established in 2020 by the Act to recognize and support caregivers. Its mission is to provide reliable and objective information on caregiving through observation, monitoring, analysis and knowledge sharing¹. Fulfilling this mission entails monitoring trends, initiatives and issues related to caregiving; remaining on the lookout for information needs among target audiences;² gathering reliable, objective and relevant information where it is to be found, then proceeding to sort and analyze it; formatting this information to make it accessible to a wide range of users; disseminating this information to its target audiences; and providing consulting expertise to decision-makers.

To help the Observatory accomplish its mandate, the Act, together with the related national caregiving policy³ and government action plan,⁴ makes provisions for strategic collaborations between the Observatory and stakeholders from a wide range of sectors. The Observatory's governance and operating structures are likewise based on such cross-sectoral cooperation.⁵ The Observatory's first strategic development plan underscores the importance of input from and the engagement of these various stakeholders in developing and implementing its activities.⁶ This orientation is enshrined in the Observatory's vision statement, which emphasizes the essential role of diverse caregiving stakeholders:

The Quebec Observatory on Caregiving is a hub for the production, sharing and transfer of reliable, essential and relevant knowledge aimed at raising awareness and fostering the recognition of caregiving, to better support all caregiving stakeholders.

OBJECTIVES

This document sets out the Quebec Observatory on Caregiving's collaboration and partnership framework with a view to guiding decisions on how to prioritize cooperative initiatives initiated by the Observatory or its stakeholders.

More specifically, the framework aims to:

1. Establish objective criteria on which to base the Observatory's response to requests for collaboration and partnership.
2. Ensure transparency towards stakeholders as to the Observatory's prioritization process for collaborative and partnership activities.
3. Ensure respect for the capacities of both the Observatory and its stakeholders.
4. Manage expectations.
5. Bring about mutually beneficial collaborations that align with each stakeholder's mission, vision and role in relation to caregiving.
6. Mobilize stakeholders in the Observatory's ecosystem.

¹ Act to recognize and support caregivers, section 35: <https://www.legisquebec.gouv.qc.ca/en/document/cs/R-1.1>

² As per the Quebec government's national policy for caregivers (*Politique nationale pour les personnes proches*, MSSS, 2021b, p. 41), the Observatory's target publics are intersectoral, multidisciplinary and transversal, ranging from caregivers to non-governmental organizations, government authorities, the scientific community, health and social services, the general public — in short, all groups and individuals concerned with caregiving.

³ *Politique nationale pour les personnes proches aidantes – Reconnaître et soutenir dans le respect des volontés et des capacités d'engagement*: <https://publications.msss.gouv.qc.ca/msss/document-003000/>

⁴ *Plan d'action gouvernemental pour les personnes proches aidantes 2021-2026 – Reconnaître pour mieux soutenir*: <https://publications.msss.gouv.qc.ca/msss/document-003191/>

⁵ See the Act to recognize and support caregivers, section 29, as well as the "Team" page on the Observatory's website: <https://observatoireprocheaidance.ca/en/team/>

⁶ See, for example, the reference to the value of cooperation or the decision to develop a strategic focus on rallying caregiving stakeholders: <https://observatoireprocheaidance.ca/wp-content/uploads/2024/04/Plan-de-dev-strat-Obs-q-proche-aidance-EN.pdf>

DEVELOPMENT

Developing the framework involved the following:

- **Meetings with Observatory stakeholders** in summer 2021⁷ and spring 2022.⁸
- Two **think-tank sessions** involving Observatory team members and the Administrative Director (May and June 2023) in which completed collaborative and partnership activities were analyzed.
- A **first exploratory review of the scientific and grey literature** on stakeholder collaboration and partnership carried out by the Observatory in fall 2023.
 - The review covered a wide range of fields (research partnerships, collaborative research, action research) and areas of activity (management sciences, educational sciences, community action, community development, public administration, patient partner engagement).
 - Publications studied described the practices of organizations recognized for their expertise in cooperative initiatives, alliances, coalitions or partnerships. These include L'Appui pour les proches aidants, the Centre d'expertise sur le partenariat avec les patients et le public (CEPPP), the Institut national d'excellence en santé et en services sociaux (INESSS), the Institut national de santé publique du Québec (INSPQ) and the CIUSSS de l'Estrie-CHUS Institut universitaire de première ligne en santé et services sociaux (IUPLSSS).
- In winter 2024, the Observatory carried out a **second exploratory review of the scientific and grey literature**, this time on approaches to selecting stakeholders for collaborative and partnership activities.
 - The approaches surveyed included the Balanced Scorecard, Collaboration Readiness Assessment, Partnership Health Check, Impact Assessment, Stakeholder Analysis and SWOT Analysis.
- **Consultations were held in November and December 2023 and in March 2024** to incorporate the practical and experiential knowledge of the Observatory's coordinating and managing committees, whose members span a range of stakeholder categories:
 - Caregivers
 - Non-governmental organizations
 - Government authorities
 - The scientific community
 - The health and social services system

DOCUMENT SECTIONS

The partnership and collaborative framework is divided into two sections. Part A looks at the dynamics of the Observatory's interactions with its stakeholders along with the core concepts informing the framework. Part B presents the Observatory's method and process for prioritizing partnerships and collaborative activities with its stakeholders.

⁷ Interviews carried out with 21 NGOs as part of the Observatory's stakeholder analysis conducted while drafting its first strategic development plan.

⁸ Consultation with representatives from 22 NGOs on April 20, 2022.

PART A

THE DYNAMICS OF STAKEHOLDER INTERACTIONS AND KEY CONCEPTS

DIAGRAM
INTERACTION DYNAMICS
BETWEEN THE OBSERVATORY
AND ITS STAKEHOLDERS

WHO ARE THE OBSERVATORY'S STAKEHOLDERS?

In this context, **stakeholders** are all groups and individuals directly or indirectly involved in or affected by the fulfillment of the Observatory's mission.⁹ Individual stakeholders refer to caregivers and members of the general public. Collective (or group) stakeholders refer to non-governmental organizations, government authorities, the health and social services system (RSSS) and the scientific community.

This is the pool of resources from which the Observatory's collaborators and partners will be chosen. Since stakeholders represent multiple areas of activity and expertise, we will refer to *intersectoral* collaboration and partnership.

HOW CAN THE OBSERVATORY'S INTERACTIONS WITH ITS STAKEHOLDERS BE CHARACTERIZED?

The Observatory relates to its stakeholders through one of three interaction dynamics: the general service offering; networking; and collaboration/partnership. Each of these dynamics involves its own set of activities.

The **general service offering** addresses all Observatory stakeholders without necessarily entailing direct contact. In this category, the Observatory identifies and publicizes its stakeholders' achievements and activities. It also offers them high-quality original publications aimed at fostering caregiver recognition and support. **Activities linked to the general service offering** allow the Observatory to identify its stakeholders (e.g. through mapping) and what they do (e.g. monitoring units). Stakeholder publications and news items are also analyzed and selected for dissemination through the Observatory's distribution channels (e.g., knowledge portal, website newsfeed, social media, newsletter).

Networking brings the Observatory into direct contact with its stakeholders. **Networking activities** include the Observatory's presence at virtual or in-person events, occasional email exchanges, social media reactions or comments, and introductory meetings. Through such contact and conversation, the Observatory and its stakeholders get acquainted, identify points of convergence or complementarity in their respective missions, and gauge their degree of availability for and interest in maintaining the connection. These actions can lead to a mutual recognition of the interest and relevance of working together around a common aim or shared goals. This is the **tipping point** toward collaboration and partnership.

Collaboration/partnership is a relational dynamic that brings together the Observatory and stakeholders who recognize the interest and relevance of pooling their efforts toward a specific goal, the ultimate aim of which is promoting caregiver recognition and support. These relationships are characterized by certain qualities:¹⁰

- They are grounded in mutual trust.
- Each party maintains its independence and identity during its interactions with the other to achieve their stated common aims.¹¹
- Differences are perceived as strengths to be leveraged — for example, by combining them constructively.¹²
- Each party benefits from the relationship, which can be described as win-win.
- The relationship is alive and continually evolving.
- The intensity of the relationship, and therefore of the interactions, can vary over time.
- Discussion between the parties and the overlap between different perspectives lead to co-construction and innovation.¹³

⁹ See the Observatory's *Plan de développement stratégique*, p. 2. <https://observatoireprocheaide.ca/wp-content/uploads/2024/04/Plan-de-dev-strat-Obs-q-proche-aidance-EN.pdf>

¹⁰ See MSSS, 2018; Tremblay & Demers, 2018; Camus, 2014; Corriveau, 2009.

¹¹ Brinkerhoff, 2002, cited in Camus, 2014.

¹² Corriveau, 2009.

¹³ Dugré & Morin, 2019; Tremblay & Demers, 2018; MSSS, 2018.

Collaborative or partnership activities are the actions or initiatives that arise from an express desire to work together. Activities can be led by the Observatory, by the stakeholder, or jointly.¹⁴ They may also involve the Observatory and more than one stakeholder.

Below are a few examples of collaborative or partnership activities:

- The Observatory leads an initiative to survey an organization about its members' needs and concerns so as to inform its knowledge monitoring and production activities.

- The Observatory recruits caregivers for its expert advisory committee or a working group.
- A stakeholder invites the Observatory to be on the scientific committee of a conference it is organizing.
- Following a discussion on the knowledge needs of caregivers and the organizations that support them, the Observatory and an RSSS stakeholder decide to co-produce a publication or co-organize an event.

COLLABORATORS OR PARTNERS?

In the sources consulted, the terms collaboration and partnership were often treated as synonyms and used interchangeably. There was no clear consensus as to their precise definitions and distinctions.¹⁵

However, a number of sources tended to distinguish “partnership” from “collaboration” by defining the former as the engagement of two or more parties in a closer relationship and/or under a more formalized structure. This perspective is particularly apparent in publications from Quebec organizations known for their collaborative approach and/or support for caregivers.¹⁶ The same view also emerged during consultations with our own committees.

Consistent with this notion, the Observatory considers “collaboration” and “partnership” as two ends of a continuum, determined by the following factors:

- The more that **common aims** are developed and pursued in tandem (rather than by one or the other party), the more the alliance resembles a partnership.
- The more that **responsibilities and leadership are shared**, the more the alliance resembles a partnership.
- The more the **parties pool their resources, knowledge and expertise**, the more the alliance resembles a partnership.
- The **greater the intensity and the longer the duration of involvement**, the more the alliance resembles a partnership.
- The greater the **complexity of the structures and processes** required to conduct the activity, the more the alliance resembles a partnership.
- The more that **working relations are formalized** (e.g., through agreements or contracts), particularly to define and agree on the factors mentioned above, the more the alliance resembles a partnership.

¹⁴ Castañer & Oliveira, 2020.

¹⁵ Castañer & Oliveira, 2020; Corriveau & Dufour, 2020.

¹⁶ L'Appui pour les proches aidants, 2020; Ndiaye et al., 2019; Nolet, 2018; David & Grégoire, 2018; Pomey et al., 2015.

WHY PRIORITIZE COLLABORATIVE AND PARTNERSHIP ACTIVITIES?

The more the Observatory develops, the higher its visibility (e.g., through networking activities) and the greater the opportunities for collaborations and partnerships.

On the one hand, this is good news, since collaborative and partnership activities can be powerful drivers for supporting social change in behalf of caregivers. They can also generate positive spinoffs for the Observatory and its stakeholders,¹⁷ for example:

- **Mutual enrichment through shared experiences and perspectives and the merging of knowledge.**
- **Greater relevance and consistency in terms of output** (e.g., adapted to the needs and realities of target audiences).
- **Extended reach and impact of the actions implemented** (e.g., able to connect with more people).
- **Better resource sharing and coordination** (i.e., financial/human/operational resources).

These benefits notwithstanding, activities carried out through intersectoral collaborations and partnerships entail certain costs along with a number of risks for the parties involved.¹⁸ For example:

- Establishing and nurturing collaborative and partnership relationships takes a great deal of time and energy.
- Misunderstandings or tensions can arise if communications are less than transparent, a shared vision is lacking or a power imbalance is perceived (e.g., the perception that one partner is exploiting the relationship for its own interests).
- Motivation can flag if benefits are slow to appear or fail to live up to expectations.
- Structural difficulties can hinder or delay the achievement of objectives (e.g. departure of a trusted person, changes in organizational priorities).

A critical consideration, therefore, is to first analyze the feasibility of a proposed collaboration or partnership activity with regard to time and effort involved. Furthermore, to avoid frustration and a loss of impetus, expectations must be clear and goals and deliverables, transparent. Ensuring respect for the independence and integrity of each party is another crucial factor, as is being fair and inclusive in the sharing of power and the division of labour.

Taking these considerations into account, the next section will describe the Observatory's strategy for prioritizing collaborative and partnership activities with a view to maximizing the benefits for both the Observatory and its stakeholders, primarily caregivers.

¹⁷ See Institute of Development Studies, 2020; Tremblay & Demers, 2018; Corriveau, 2009; Cummings & Holmberg, 2012.

¹⁸ See Lelubre & Moriau, 2023; Corriveau & Dufour, 2020; Georgalakis & Rose, 2019; Trembay & Demers, 2018.

PART B**PROCESS FOR PRIORITIZING COLLABORATIVE AND PARTNERSHIP ACTIVITIES****ABOUT THE PROCESS**

The table below provides a step-by-step outline, including the key aspects to consider, of the process developed by the Observatory to prioritize collaborative and partnership activities. It is intended as a practical guide to decision-making that can complement and support the user's own judgment and experience.

The table's content and structure are based on an exploratory review of the scientific and grey literature that looked into a wide range of collaborative tools and models.¹⁹ The criteria that emerged were sorted, analyzed and categorized in keeping with

- the Observatory's mission,
- its strategic development plan, and
- the dynamics of its stakeholder interactions (described in Part A).

The table has been designed to help guide decisions about potential collaborative and partnership activities with stakeholders, regardless of their interaction dynamic with the Observatory. However, before any such joint undertaking can be considered, an introductory meeting must be set up to allow both parties to get acquainted, identify the points of convergence or complementarity of their respective missions, and assess their availability for, their interest in and the relevance of working together.²⁰ Similarly, at any point in the process, it is important to obtain the additional information needed to complete the table (e.g. by contacting the stakeholder).

The same prioritization process shall apply, regardless of whether the activity is initiated by the Observatory or by the stakeholder. To optimize the process, for each activity considered, two or more Observatory representatives will complete the table individually, compare their answers, then make a decision based on interjudge agreement. If multiple stakeholders are under consideration, the table must be completed for each potential collaborator or partner, after which the results must again be compared. Should this process fail to yield a clear answer, or in the event of any lingering questions, another Observatory representative with a strong grasp of the context will be consulted.

The process has been designed to guide the decision to go ahead (or not) with an activity as it is currently understood. It can also guide collaborator/partner selection based on factors indicating the likelihood of a successful outcome and achieving the identified benefits. Furthermore, based as it is on a deliberative approach, the process can yield useful insights on how the activity could be adapted or modified to maximize its benefits without exhausting the capacity of either party. If relevant, a formal agreement can be drafted in keeping with each respective organization's guidelines and legal requirements.

¹⁹ Including the following: Balanced Scorecard, Collaboration Readiness Assessment, Partnership Health Check, Impact Assessment, Stakeholder Analysis, SWOT Analysis.

²⁰ See the above section, "How can the Observatory's interactions with its stakeholders be characterized?"

TABLE THE QUEBEC OBSERVATORY ON CAREGIVING'S PROCESS FOR PRIORITIZING COLLABORATIVE AND PARTNERSHIP ACTIVITIES

Date of the proposal:		Decision date:		
Brief description of the activity (e.g., objectives, deliverables, planned schedule):				Legend 1 = Not at all 2 = A little 3 = Somewhat 4 = A lot 5 = Extremely
Potential stakeholder:				
Aspect to analyze	Sample considerations	Positive factors	Barriers or challenges	Score
Alignment with the Observatory's role and strategic priorities To what extent (if any) does the planned activity correspond to the Observatory's role and strategic priorities?	<ul style="list-style-type: none"> • Mission • Role • Vision • Values • Strategic directions • Priority actions (e.g., yearly action plan) 			
Potential benefits To what extent (if any) should the planned activity generate benefits for the Observatory and for its stakeholders, primarily caregivers?	<ul style="list-style-type: none"> • Enrichment through the sharing of experience and perspectives and the merging of knowledge • Improved relevance and consistency of output • Extended reach and impact of actions • Better coordination / fewer redundant efforts 			



Aspect to analyze	Sample considerations	Positive factors	Barriers or challenges	Score
<p>Stakeholder's organizational characteristics</p> <p>To what degree should the stakeholder's organizational attributes contribute to the success of the activity and help achieve the identified benefits?</p>	<ul style="list-style-type: none"> • Alignment of strategic aims • Compatible organizational culture and/or approach • Complementary strengths/expertise • Advantages in terms of positioning (e.g., reputation) • Promising attributes for a successful collaboration/partnership (e.g., openness, financial and team stability) • Quality of the existing relationship with the Observatory (e.g., capital of trust) 			
<p>Feasibility</p> <p>To what extent would it be possible to carry out the activity without overextending the Observatory's capabilities?</p>	<ul style="list-style-type: none"> • Activity-related demands (e.g., required steps/actions, human resources, budget, scheduling) • The Observatory's ability to meet activity-related demands • Stakeholder's contribution to meeting activity-related demands 			
Total				/ 20
Recommendation				<p>Legend</p> <p>1 = Not at all 2 = A little 3 = Somewhat 4 = A lot 5 = Extremely</p>

CONCLUSION

Intersectoral collaborative and partnership activities are particularly relevant and effective in the face of complex, multifactorial social phenomena such as caregiving. By mobilizing the complementary skills and expertise of different stakeholders, they can yield solutions or initiatives with the potential to generate multiple benefits for their target populations while contributing positively to the missions of the participating parties (individuals/organizations).²¹ As much of the literature emphasizes, time and effort put in early on will pay off inasmuch as they will promote the long-term success and sustainability of collaborations and partnerships that have been chosen wisely.²²

The intersectoral collaboration and partnership framework outlined in this document sets out how the Observatory, in keeping with its mission, understands its relations with and seeks to work alongside its stakeholders, the better to foster caregiver recognition and support.

To begin with, the framework clarifies relations between the Observatory and its stakeholders by categorizing them into three main dynamics of interaction, each of which has its own activity subset:

- The general service offering
- Networking
- Collaboration and partnership, seen as two ends of the same continuum and determined by multiple factors

Secondly, the framework outlines a process for prioritizing joint initiatives proposed either by the Observatory or by one or more stakeholders. Within this process, the proposed activity is analyzed based on four key aspects:

- Alignment with the Observatory's role and strategic priorities
- Potential benefits
- Stakeholder's organizational attributes
- Feasibility

This collaboration and partnership framework thus provides clarity and transparency on how joint initiatives are objectively understood and prioritized by the Observatory, in keeping with its own capacity as well as that of its stakeholders, contributing to the management of expectations. Moreover, the framework promotes mutually beneficial collaborations and partnerships between the Observatory and its stakeholders; it also mobilizes the various components of the Observatory's ecosystem.

The framework will be deployed by the Observatory starting in April 2024 for the 2024-2025 fiscal year. It will be assessed every two years to identify strengths and weaknesses, apply relevant updates and make any necessary improvements.

²¹ Camus, 2014; Corriveau, 2009; Frank & Smith, 2000.

²² See Community Tool Box, 2023b; Georgalakis, 2020; Alves, 2015; Bourque, 2008.

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