A Tool to Develop Case Studies to Strengthen Cross-sector Partnerships

Purpose of the Tool

The purpose of this tool is to provide a method for gathering information about a specific situation and to use this information to write a case study that demonstrates the development of a cross-sector partnership. The aim is for those working in cross-sector partnerships to share their experiences overcoming challenges to achieve success together and by doing so, everyone can consider these experiences to strengthen their own partnerships. Taking time to learn from successful experiences can also help to strengthen partnership development in other areas where similar contexts might apply.

A cross-sector partnership consists of a cross-section of people from different professions who represent different sectors (e.g., education, health, municipal, non-profit, recreation) coming together to build a collaborative relationship and collectively develop mutually agreed upon objectives and contribute to a common goal.

Outlined is a rational for using a case study design and step-by-step process and template to develop your own case study.

Why Use a Case Study Design?

A case study is a research method used to understand real-life happenings and their contextual conditions. This type of knowledge generation helps to focus on a distinctive situation and extract a better understanding of the situation and what was learned. The focus is for a case study to represent one initiative, program or event. Partnerships are encouraged to complete the tool multiple times to develop a catalogue of cases. They are also encouraged to share their completed case studies with the Ontario Public Health Association for publication on their website showcasing an inventory of cases as part of the Keeping Kids Healthy through Collective Impact project.

The purpose of developing a case using this tool is to better understand the facilitators and barriers of developing cross-sector partnerships. The aim is to show through the reflection of one initiative, program or event, the barriers and facilitators experienced that supported or hindered the development of a cross-sector partnership. The findings from a report Understanding Cross-sector Partnerships: A Provincial Scan informed the development of the questions used in this tool. This report identified the types of barriers and facilitators that were most often experienced when working across sectors in partnership.

> ⚙ Facilitators are actions that enable the partnerships to work effectively and overcome barriers.
>
> 🔧 Barriers are obstacles that can make working in partnership challenging.

How Should This Tool Be Used?

There are several ways this tool can be used.

- One way is to have everyone reflect on their involvement with a specific initiative, program or event by considering the questions in this tool and recording their thoughts in the template provided (Appendix). The next step is to as a group, share your individual answers and synthesize the results to develop a collective picture of the experience of working in partnership on that specific case.

- Another way is for members of the partnership to work through the questions together and complete the template based on the collective viewpoints of those involved.

- A third way is to have a person from outside of the partnership interview those involved with the initiative, program or event, synthesize the answers for each question and share the results with the partnership.

Any of these ways will work. The idea is to share the experience, challenges, strategies and lessons learned from working together as a cross-sector partnership to accomplish an initiative, program or event. The information gathered is used to write a 'case' of a particular initiative, program or event with a focus on working with specific sectors.

Protecting Privacy and Ensuring Accuracy:

- The names of actual partners or organization should not be included when writing a case study but should be represented by sector (e.g., education, health, non-profit).
- Those involved in developing the case should have control over how much information is shared. Information should be summarized in such a way that privacy is not breached.
- Those who participate in the development of case should be given an opportunity to review a draft version prior to publically releasing the information.

Consider submitting your completed case study to the Ontario Public Health Association for publication on our [Keeping Kids Healthy through Collective Impact project page](#).

Six Steps for Developing Case Studies

As a partnership:

1. **Agree to engage in the process of writing case studies**. Ensure everyone understands the value of sharing this information as a way to strengthen and leverage the development of cross-sector partnerships. If a partner is unsure of investing in this activity, encourage them to read [Understanding Cross-sector Partnerships: A Provincial Scan](#).

2. **Identify one specific initiative, program or event that highlights the partnership working together and includes the involvement of more than one sector.** This is referred to in this tool, as a "case". The steps below are to focus on the agreed upon case.

3. **For the case identified, briefly describe the initiative, program or event, include the purpose or goal and the sectors involved.** Draft this information and as a group refine it to provide enough background about the case that readers can put in context when reading the challenges, strategies, actions and lessons learned described in your case study. When identifying or naming sectors, consider if any of the following were represented.
   - **Education sector** (e.g., primary, elementary, secondary and post-secondary schools, public libraries, childcare centres/establishments).
   - **Health care sector** (e.g., hospitals, family health teams, community health centres, nurse practitioner-led clinics, general practitioner-led clinics, mental health services).
   - **Municipal sector** (e.g., municipal departments, working groups, staff, elected officials).
   - **Non-profit sector** (e.g., non-government organization, charity, organizations such as a club, society or association which operates solely for social welfare, civic improvement, pleasure or recreation or any other purpose except for profit).
   - **Public health sector** (e.g., Public health unit, public health agency).
   - **Recreation sector** (e.g., private and public funded recreation facilities, sports associations/ leagues).
   - **Other sector**, any other sector not listed (e.g., faith, private, retail).

Questions to consider when writing this section are: What initiative, program or event will be the focus for this case study? Describe and include the types of sectors represented and what they were working together to achieve (e.g., describe the initiative, program or event, include the purpose/goal and what was done to plan, and implement it by the partnership).

4. **For each sector identified, complete the set of questions below related to:**
    - **Challenges** experienced the partnership (e.g., barriers for working together).
    - **Strategies** used to overcome the specific challenges or overall strategies to strengthen the partnership (e.g., facilitators).
    - **Examples of actions** taken to effectively work together across sectors (e.g., how was the partnership strengthened, what was achieved).
    - **Lessons learned** related to working with partners (e.g., key message(s) related to partnership development and cross-sector collaboration).

Questions to consider for each section:
*NOTE: The list of barriers and facilitators are from the report "Understanding Cross-sector Partnerships: A Provincial Scan."

Challenge(s): Identify one or more challenges experienced when working with the <insert name of sectors here>. Consider for each sector whether or not the following barriers were present. If so, describe how.

1. Financial and time commitments outweighed the potential benefits of being involved
2. Lack of support from their own organization
3. Human resource issues (such as lack of staff capacity)
4. Bureaucracy/Administration requirements
5. Too little time to implement the initiative for effective consultation
6. Lack of time to develop a relationship
7. Differences of philosophies and manner of working together
8. Lack of commitment
9. Lack of readiness for this type of partnership or initiative
10. Lack of understanding of roles/responsibilities within the partnership
11. Manipulated or dominated the partnership, or competed for the lead
12. Hidden agendas
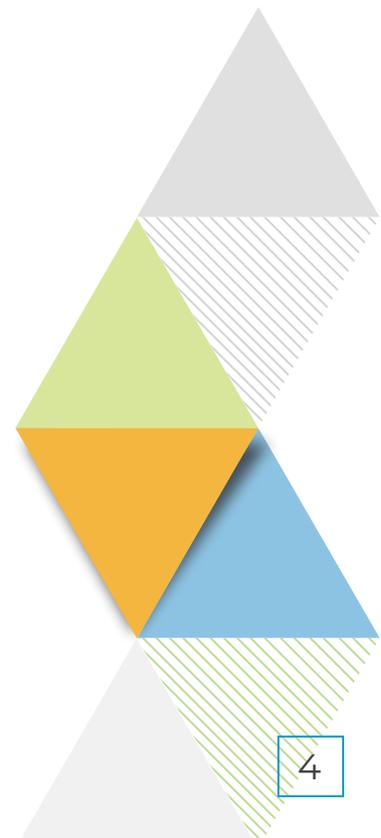
Strategies: Identify one or more strategies used to overcome the challenges identified (e.g., what was done to overcome the challenge(s)?) or overall strategies used when working with the <insert name of sectors here>. Consider for each sector whether or not the following facilitators were present. If so, describe how.

1. Leveraged and/or shared resources
2. Worked together for change
3. Shared a common vision
4. Fostered an environment for shared understanding
5. Participation in the partnership was recognized and empowered by their own organization
6. Clear understanding of role and responsibility with the partnership within the partnership and initiative
7. Modeled clear communication
8. Had a champion to promote the partnership and/or initiative
9. Aligned mandates
10. Leveraged relationships
11. Have strong leadership skills
12. Provided incentives as part of the initiative
13. Modeled a strong communication loop between the partnership and own organization
14. Shared in decision-making
15. Accountable for the actions taken and ownership for delivering the objectives of the partnership
16. Shared leadership

Examples of actions: Identify actions taken to effectively work together across sectors (e.g., what was done? What was achieved?). Focus less on the small details and more on the big picture achievements related to working together as partners and what specifically that sector partner added.

Lessons learned: Reflect on the information above and identify one lesson learned from this experience that can be applied to future or present cross-sector partnerships. Write a summary sentence of the lesson learned. Here are some ideas identified by others who have worked across sectors, consider if any apply from the list below:
> Invest in building relationships and trust
> Model clear communication
> Invest in developing facilitation skills
> Learn more about Collective Impact
> Learn more about Asset-based Community Development

You may have to complete this step several times depending on the number of sectors identified. The intention is that for each sector the specific barriers, facilitators, strategies and actions identified are outlined.

5. **Use the Case Study Template (Appendix) for each sector identified and write a case study.** Send the completed case study to your partners involved in developing it to ensure accuracy of information and approval to share publically. Gather their feedback and make necessary changes.

6. **Submit your partner-approved Case Study to the Ontario Public Health Association for publication on our Keeping Kids Healthy through Collective Impact project page.**

Examples of Case Studies

This tool was used to write four case studies to share how a partnership built cross-sector linkages to create communities where it is easier for all children to live healthy lives. These case studies are available at [Keeping Kids Health through Collective Impact](#).

Cross-sector Partnership with the Education Sector: School Boards, Schools and Parent Councils

Cross-sector Partnership with the Education Sector: Public Libraries

Cross-sector Partnership with the Non-profit Sector: Charitable and Health Promoting Organizations

Cross-sector Partnership with the Recreation Sector: Sports Associations and Leagues

Keeping Kids Healthy through Collective Impact Case Study Template:

CASE STUDY

Keeping Kids Healthy
Through Collective Impact

CROSS-SECTOR PARTNERSHIP WITH <INSERT SECTOR>: <INSERT TYPE OF ORGANIZATION>

Background:

CHALLENGES EXPERIENCED

Text Box

Templates (.docx files) can be [download here](#).