

GUIDE TO COLLABORATION POLICY TEMPLATE

ABOUT THIS POLICY AREA

This policy guides how the organisation collaborates with other agencies in the delivery of services.

A written collaboration policy is required as part of meeting Standard 2 (Responding to individuals, families and communities).

Standard 2 — collaboration

The organisation develops, implements and reviews policies and procedures for working with other organisations, including government agencies, to provide the range of services required by a client.

Policy checklist

The following checklist will help you check that an existing policy covers this area adequately.

The policy should:

- outline the respective roles and responsibilities for case management and service planning in relation to individual clients, and how these are negotiated with other government and non-government agencies
- describe how collaborative working protocols with other agencies are developed, ratified, reviewed and terminated if necessary
- explain the participation of the organisation in local and other relevant networks
- contain clear procedures and actions
- indicate the timing of any actions
- show when it was approved
- show when it was last reviewed.

COMPLETING YOUR COLLABORATION IN SERVICE DELIVERY POLICY

Using the policy template

The template provides some example statements. You can adapt these statements and include them in your policy or write your own statements to better suit the operations and services of your organisation.

To customise the policy template, click on the shaded sections <<Insert text>> and insert the information that is specific to your organisation.

When you have finished the policy template, delete the shaded instruction sections such as: [Refer to the collaboration in service delivery policy template guide for questions and/or examples to consider when customising this section.](#)

For further information on using the policy guides, refer to the information in *Using the policy templates and guides*.

Guidelines for each section of your policy

1. Purpose

When identifying the purpose of the policy, consider how it might apply to your client group/s and other agencies you work with. Do you need to make specific statements to ensure you are inclusive of particular groups, such as Aboriginal and Torres Strait Islander peoples, Australian South Sea Islanders, people from culturally and linguistically diverse backgrounds, and people with a disability?

Consider whether there are any other reasons for or benefits to your organisation or your service network in developing a collaborative approach in service delivery.

2. Scope

To determine the scope of the policy, consider the following questions:

- Does this policy apply to all your organisation's services and to all clients and stakeholders?
- Are there particular external requirements for specific service types that affect your service delivery policies?
- Which staff will be involved in developing collaborative relationships and protocols with relevant agencies?
- What types of organisations would be relevant to the services your organisation provides?

3. Policy statement

If you are adopting the policy statement in the template, consider whether there are any additional commitments your organisation wants to make.

In identifying the actions your organisation will take to implement this policy, you should include the following:

- how you work cooperatively with other agencies in the delivery of your services to provide your clients with the opportunity to access a service network that meets the full range of their needs
- how you establish and maintain collaborative relationships and protocols and participate in networks with relevant agencies.

4. Procedures

The procedures describe how your organisation achieves the aims and goals you have outlined in your purpose, scope and policy statement.

4.1 Collaboration in service delivery

Interagency collaboration in service delivery will enhance your service through cooperative effort and effective referrals to and from your service. Establishing and maintaining relationships with other relevant agencies provides clients with the opportunity to access a service network that meets the full range of their needs.

Your policy on service requests and referrals should:

- list those agencies you have close working relationships with
- describe how you foster good working relationships with these agencies
- explain the circumstances under which you accept and make referrals to each agency.

The procedures in this policy cover the way you work with other agencies during relationships with individual clients at all stages of their contact with your service: eligibility assessment, needs assessment, service planning, service delivery, service review and service closure.

In describing the practical steps you will take to establish, maintain and manage effective working relationships with other agencies (or groups of agencies), consider the following:

- how working protocols are developed, ratified, reviewed and when necessary terminated, and what written agreements are signed between the agencies
- how case management and service planning roles and responsibilities are negotiated, including where a client is formally in the care of a government agency
- how you manage incoming referrals and make outgoing referrals, and what records you keep of these
- in what circumstances collaborative working arrangements are established in relation to service planning, provision and review for a specific client, and what agreements (if any) are signed between the client and the agencies
- how the relationship with one or more services is maintained and managed throughout the delivery of services to a client, and who is responsible for managing the relationship
- what specific confidentiality and privacy issues must be addressed in collaborative working (Refer to your confidentiality policy and your privacy policy.)
- which local and other relevant networks the organisation will participate in, how it will participate, and who its representative/s will be.

5. Other related policies and documents

List the other policies related to the collaboration in service delivery policy. This may include:

- service delivery policy
- allocation policy
- ending service delivery policy
- community development and community education policy.

List policies about client access and rights, in particular:

- access policy
- eligibility policy
- service requests and referrals policy
- privacy policy
- confidentiality policy.

Also list the forms and other organisational documents related to your collaboration in service delivery policy.

6. Review processes

Consider how often this policy should be reviewed and the process for doing this:

- **frequency of review:** Most policies benefit from an annual review. The experience of implementing the policy is used to decide which changes are necessary. Consider reviewing your collaboration policy as part of an annual review of your organisation's policies or, if your organisation is small, perhaps over a three-year period. Critical incidents may prompt you to review the policy ahead of schedule.
- **responsibility for the review:** In most organisations, the person accountable for client services would be responsible for reviewing this policy. In small organisations, this may be the manager or service coordinator. In larger organisations, this may be the client service manager.
- **process for the review:** Decide which particular staff, volunteers, external people and organisations will provide input to the policy review, and whether clients will be involved.
- **decision-making process:** Who will review draft changes to the policy, and who will approve changes? What will be the timeframe for the review process?
- **documentation and communication:** What records of the policy review process are needed? How will changes to the policy be communicated to staff implementing the policy? In a small organisation, this may be as simple as noting the changes at a staff meeting. In a larger organisation, an email memo may be needed.
- **key questions for the review:** Is the policy being implemented? Are procedures being followed? Is the policy clear? What has changed that may prompt a change to the policy? Have particular stakeholders had difficulty with any aspect of the policy? Can their concerns be resolved? How does the policy compare with that of similar organisations?