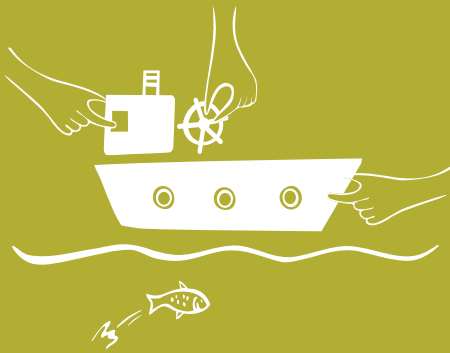


ANGÈLE BILODEAU ■ ANDRÉ-ANNE PARENT ■ LOUISE POTVIN

# INTERSECTORAL COLLABORATIONS AND PARTNERSHIPS, HOW DO THEY WORK?



CHAIRE DE RECHERCHE DU CANADA  
APPROCHES COMMUNAUTAIRES  
ET INÉGALITÉS DE SANTÉ

# INTERSECTORAL COLLABORATIONS AND PARTNERSHIPS, HOW DO THEY WORK?

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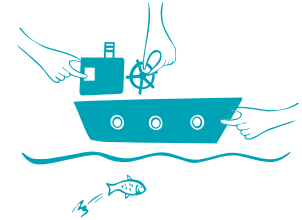
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# Introduction

When action is taken in complex situations, intersectoral collaborations and partnerships come into play. This is the case when the intervention of a single organization or sector fails to provide sufficient or adequate responses. Intersectoral collaborations seek to create interdependencies between diverse actors in order to develop more contextually appropriate and comprehensive responses. Pooling the necessary expertise and resources allows for innovation where traditional action is deemed inappropriate.

## WHAT DOES THIS MANUAL OFFER?

This manual is the translation of the second, updated, and expanded edition of *Le partenariat comment ça marche: Mieux s'outiller pour réussir*, published in 2003. This new edition discusses intersectoral collaborations before focusing on an advanced form of collaboration, namely, action in partnership. It proposes **ways to advance intersectoral collaborations and working in partnership** with supporting illustrations from case studies of various intersectoral actions.

The manual is comprised of six parts.

The first part provides some historical landmarks on the emergence of partnership and intersectorality in public action. It presents the goals, benefits, and current challenges.

The **second part** examines what constitutes an actor. It defines the social position and identity of the actors as well as their action strategies in the face of the issues that mobilize them.

The **third part** offers five key components to make progress within a collective action, notably how to work with power relations and with different logics of action, or how to make the most of the production of “intermediaries” and their use.

The **fourth part** looks at controversies, how to recognize them, and how to move forward by suggesting three ways to deal with them.

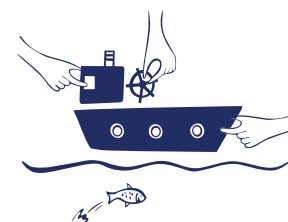
The **fifth part** is devoted to the role of mediator. It outlines the knowledge and skills required and the roles that the mediator plays in collective action. It presents three mediating practices—cognitive, strategic, and logistical—to move collective work forward.

The **sixth part** details six conditions for effective partnerships, along with tools for mapping the partnership and supporting collective reflection.

This manual emphasizes the added value of collaborative work, which lies in the development of new practices and solutions to situations deemed problematic. It emphasizes that these innovative actions rely as much on new materials—the new knowledge and renewed visions emanating from the debate of ideas—as on new roles and renewed relationships among actors. Innovation brings about change and creates a new dynamic in an environment. Social innovation is a kind of tinkering that takes place in action. Experience shows that, even with only a little initial knowledge, good results can be obtained by mobilizing action.

# Part one

## What are intersectorality and partnership?



### CONTEXTS OF EMERGENCE

**Action in partnership** is not a new idea. In the 1980s, it was seen as a way to renew the role of government by seeking a new sharing of responsibilities with civil society. The welfare state was followed by the emergence of the partner state. The technocratic and centralizing model, which dominated the development of modern States in the post-war period, has been challenged since the 1970s. The place of actors in public policies and programs, and more broadly that of citizens, is therefore at the heart of debates aimed at democratizing decision-making and improving public policies, programs, and services.

This leads to **various participatory and adaptive approaches** in public policy and program planning. These approaches seek to recognize:

- ▶ the plurality of the forms of knowledge: scientific, experiential, practical;
- ▶ the diversity and divergence of interests of the actors involved;
- ▶ the multiplicity of situations and contexts;
- ▶ negotiation in decision-making, i.e., the participation of various actors in the decision; and
- ▶ the progressive development of the action, in the sense that the initial plan cannot be a finished work.

These approaches to public planning allow for varying degrees of participation, **from consultation to action in partnership**. The central issue is, what is the place of experts, interest groups, communities, organizations, and citizens' groups, in relation to public planners and funders in decision-making? In other words, who decides for whom in choosing priorities and interventions?

## Box 1 The partnership approach in the field of education in Québec

In 1997, the Québec Government enacted the *Education Act* which formally recognized the community and parents as important partners in the school's educational project. This strategy aimed to address the many challenges that make it difficult for schools to integrate and educate children adequately on their own.

As for the **intersectoral collaborations**, they emerge from the will to overcome the administrative and political barriers between the sectors of public action created with the development of modern States. Sectors are the historically constructed domains of action with their specialized knowledge, institutions, interests, and different professional cultures that characterize these public services (e.g., education, health services, social services, transportation). These domains include structures (e.g., the Ministry of Education, school boards, and schools), territories, and boundaries (e.g., the different professions in education: elementary-school teacher, special-education teacher, remedial teacher, educational consultant), as well as planned, authorized, and funded rules to preserve their specificity and institutions (e.g., educational programs). This sectorization process also divides the market and civil society associations by establishing sectoral standards and financial frameworks.

Intersectorality includes **collaborations between policy sectors** or, in other words, between thematic areas of intervention, such as education, food security, housing, early childhood, and home support for seniors. By extension, intersectorality also includes the relationships **between the major spheres of society**, namely, government and public institutions, the market, civil society, and hybrid organizations, such as philanthropy, which mixes characteristics of the private sector, public sector, and civil society. These collaborations take place horizontally at the different levels of public action (local, regional, or central governments) and vertically between levels (e.g., top-down programming logic). Taking into account the levels of action is important because we live in a world where phenomena that appear local at first quickly become global when we look more closely, and vice versa.

At the end of the 1980s, several responsibilities shifted from the government to private or associative actors, leading to a **multiplication of actors from different sectors** in public action: traditional sectors of public administration, but also more and more responsibilities transferred to private companies, social-economy businesses, or community organizations. The role of private and public philanthropy was also growing, which created a wider range of different powers and interests in the conduct of public policy.

This diversification of actors led us to conceive of **public action**, not only as government action, **but as sets of collective actions carried out by networks of heterogeneous actors**.

The notion of **governance** emerged in this context to signify the collective processes and rules by which the multiple actors involved participate in negotiating, deciding on, and implementing public actions.

## Box 2 Intersectorality in the field of public health

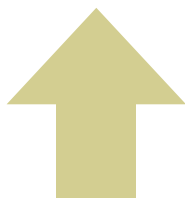
Intersectorality was recognized in the *Ottawa Charter for Health Promotion* of 1986 as the major strategy for addressing health determinants and social inequalities in health. It was established that the greatest potential for improving the health and well-being of populations lies in healthy public policies; the creation of supportive environments; and the strengthening of local communities, self-help networks, and proximal interventions. All of which require intersectoral action.

### GOALS

Intersectoral collaborations aim to overcome barriers arising from the sectorization process and to create **interdependence** between sectors. The aim is to reconcile existing sectoral interventions (policies, programs, and projects) or to create new, more comprehensive interventions to better address the complexity of societal problems. This mode of action becomes increasingly demanding as the degree of collaboration among the actors increases. Greater interdependence in collective action is accompanied by each actor experiencing a loss of autonomy. It is generally considered that there are four levels of collaboration between sectors.

Figure 1. The four levels of collaboration between sectors

#### INTERDEPENDENCE



#### AUTONOMY

- **INTEGRATION**
- **COORDINATION**
- **COOPERATION**
- **THE EXCHANGE OF INFORMATION OR THE REFERRAL OF PERSONS**

- ▶ **The exchange of information or the referral of persons** require a minimal degree of collaboration.
- ▶ **Cooperation** refers to working together to optimize resources to better accomplish one's own goals. This requires less interdependence between sectors than coordinating actions.
- ▶ **Coordination** involves working together across sectors to make mutual adjustments to interventions (policies, programs, and projects), so that they are more coherent and robust in achieving joint goals.
- ▶ **Integration** aims at co-constructing new, more comprehensive interventions (e.g., government policies that integrate multiple sectors) and requires the integration of objectives, processes, resources, and actions. It requires an even greater degree of collaboration and interdependence between sectors.



Action in partnership is an advanced form of collaboration between organizations at the level of integration. It is a formalized collaboration between different organizations that engage in **joint negotiated action**. Its goal is to develop answers to complex problems that organizations are unable to solve on their own. Action in partnership generally involves the pooling of knowledge and resources and may require actors to modify their roles or activities, or the way their organizations function.

## CHALLENGES AND BENEFITS

The difficulty with intersectoral action lies in the fact that it must deal with a diversity of issues (what is to be gained or what can be lost) intertwined by the bringing together—and competition—of sectoral, discipline, or professional knowledge and practices, and different perspectives on problems and solutions. Intersectoral action must also address:

- ▶ the superposition, over time, in the same or different sectors, of policies, programs, or instruments (e.g., planning or accountability tools) that become contradictory or inconsistent;
- ▶ the interest of sectors—or sponsors of different programs—in setting their own goals and rules and in exercising control over an area of action;
- ▶ power relations between sectors (including policy spheres) and between levels; and
- ▶ sectoral funding and accountability systems.

In turn, intersectoral action has the advantage of fostering new practices and innovation, reducing program duplication, increasing opportunities for action at different levels of determinants, and increasing the potential for impact of interventions by pooling funding and resources. It has been shown that the results of policies or programs that address complex situations are most often the result of networked approaches rather than single actors.

# Part two

## What is an actor?



As the name indicates, the actions are carried out by actors. Understanding the actors is the first key component for developing collaborations.

From the outset, it is important to remember that actors in intersectoral action come from different backgrounds: the public, associative, philanthropic, and private **spheres**; the various **sectors** (e.g., education, health, social services, agriculture, culture, housing); and the different **levels** of intervention (local, regional, and central government). The populations targeted by the interventions are also actors. They know their own situation and can mobilize in understanding the problems and in finding solutions. Thinking with them throughout the process, from priority setting to implementation of actions, can be beneficial.

The actors occupy a **social position**, i.e., a place in society with its constraints and advantages. The sector in which they work largely defines their social position. Actors are also defined by their mission, values, and vision: it is their **identity**.

Actors are all participants—citizens, organizations, sectors—that interact in a situation and influence each other. As a result, they form a **network**. These actors have autonomy, hold knowledge and resources, and deploy **strategies** to achieve goals. These strategies depend on their own interests and assets, but also on the strategies adopted by other actors and the context. Strategies also depend on the **issues**: each actor perceives the stakes for themselves, i.e., the risk of losing their capacity to act or the opportunity to increase it. Normally, the higher the stakes, the more the players mobilize.

The advantages that actors have and mobilize, and the strategies they develop, shape their **power relations**. While it is true that some actors have more advantages, actors are rarely left with no source of power. For example, in a public–community partnership, while the public actor often controls the funding sources, the community actor has more effective means of reaching and intervening with the target populations. While these populations are vulnerable, they are aware of their own situation, have resources, and are able to advocate for their needs. At the very least, they can refuse to accept the portrait of their situation and the services offered to them.

The tool **Characterizing the Social Actors in a Situation** is used in Box 3 to illustrate the social position and identity of the actors in relation to their interests and the issues that mobilize them in the case of the funding model of community organizations in the Montréal early-childhood field, from 2008 to 2015.

**Box 3 Characterizing the social actors in the case of the funding model of community organizations in early childhood (Montréal, 2008–2015)**

This situation involves two groups of actors: public and public–philanthropic funders, on the one hand, and the community sector, on the other hand.

Public and public–philanthropic funders at the provincial level provide project-based funding with specific mandates and rules governing grant awarding and accountability to local collaborative action bodies. Given their social position, their interest is to ensure the funding of actions that are in line with their respective provincial missions.

The community sector—the primary recipient of funds—is advocating for mission-based funding that allows organizations greater flexibility and funds a wider range of activities. Given the social position of community organizations, project-based funding carries the risk that they will deviate from their local mission to fit that of funders. In addition, it places them in the position of service providers rather than full partners in local collaborative action. While funding programs make participation in local collaborative planning a funding requirement, they do not recognize mission-based funding that would give organizations more autonomy and resources to fully engage in collaborative action.

In this situation, the power relation between the parties—linked to their respective social positions as provincial funders and local community organizations—makes it possible to understand why project-based funding has prevailed despite the demands of the community sector for mission-based funding.



## Characterizing the Social Actors in a Situation tool

Actors	Social Position Identity	Interests Issues
Government (various ministries) Private foundation Lucie & André Chagnon Public–philanthropic partnerships	Public and public–philanthropic funders with their respective values, missions, and funding programs.	Project-based funding for local collaborative action, with specific mandates that are consistent with their mission, and rules for grant awarding and accountability.  Participation in local consultation as a condition of funding access.
Local Community Organizations (COs)	Community sector  Community-based organizations whose mission is defined by their members and who obtain public or philanthropic funding to conduct their activities.	Demand for mission-based funding.  Project-based funding: <ul style="list-style-type: none"><li>• positions COs as service providers rather than partners in collaborative local action;</li><li>• risks distancing them from their own mission; and</li><li>• restricts their autonomy and resources to invest in local collaborative action.</li></ul>

### Sources:

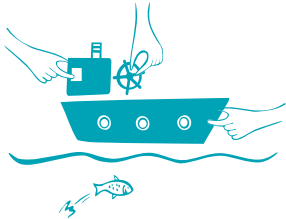
Bilodeau, A., Laurin, I., Rose, F., and Clavier, C. (2017). Interface entre les programmes de financement et l'action locale concertée en petite enfance. Série *Carnet Synthèse*, no. 12. Montréal, Canada: InterActions, Centre de recherche et de partage des savoirs du CIUSSS du Nord-de-l'Île-de-Montréal. Found at

<https://centreinteractions.ca/publication/carnets-synthese-interface-entre-les-programmes-de-financement-et-laction-locale-concertee-en-petite-en-enfance/>

Bilodeau, A., Laurin, I., Giguère, N., and Potvin, L. (2018). Understanding challenges of intersectoral action in public health through a case study in early childhood programmes and services. *Critical Public Health* 28, 225-236. <https://doi.org/10.1080/09581596.2017.1343934>

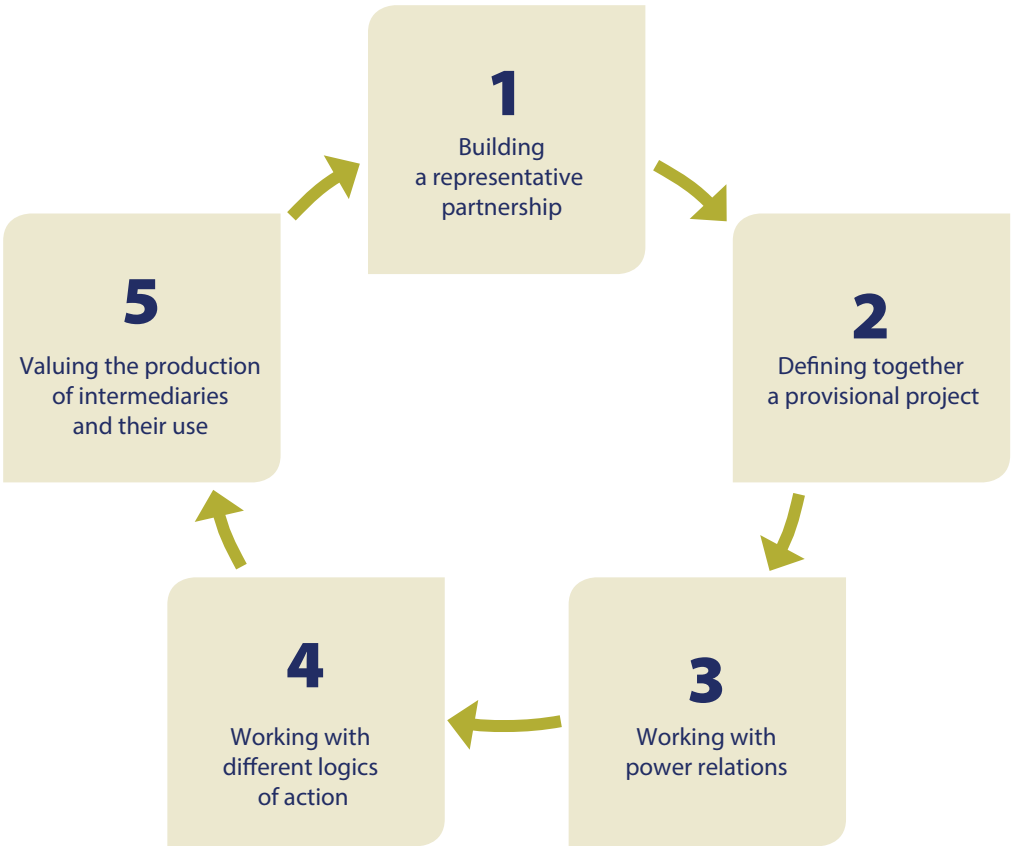
# Part three

## Seeking progress in collective action



How do we move forward with intersectoral collaborations and partnerships? How do we work with power relations or with partners who implement different logics of action? This third part offers five key components in answering these questions.

**Figure 2. Five key components to moving collective action forward**



## 1) BUILDING A REPRESENTATIVE PARTNERSHIP

The actors involved in the situation to be modified are concerned by the partnership, i.e., they have interests to assert or issues to defend. This includes organizations and individuals who **experience** this situation as well as the actors who **hold knowledge and resources** and who **act or could act** in this situation. Familiarity with the situation to be changed as well as knowing who the actors are and what their issues are is the starting point for building the partnership.

Written information is useful in this regard, but so are exchanges between actors. Three questions can assess whether the actors concerned are mobilized:

- 1) Which actors are already involved and which have been approached?
- 2) Do the mobilized actors make it possible to explore the important aspects of the situation to be changed?
- 2) Have the strategic actors (i.e., those who will rally others) and the critical actors (i.e., those without whom a project cannot emerge and be carried out) been mobilized?

Partnership building as well as definition of the problem and the courses of action are **ongoing activities** that progress and are reinforced throughout the process through the action. The exercise therefore consists of collectively defining a provisional project in order to initiate work as well as to attract the interest of and to mobilize the relevant actors for the developing action.

## 2) DEFINING TOGETHER A PROVISIONAL PROJECT

What we are looking for at the beginning of a partnership approach is to mobilize potential partners and establish a participatory dynamic. This requires defining together a provisional project, i.e., determining the **major elements** of the problem and the possible courses of action. This leaves room for the changes in points of view, negotiation, and compromise for adaptation between actors and to the context. This method promotes innovation by encouraging exchanges between the different types of knowledge (scientific, experiential), data on the environment, previous initiatives, and the actors concerned and those already involved. By leaving the door open for change, the provisional project **expands the possibilities for action**.

## 3) WORKING WITH POWER RELATIONS

Power is something that one **exercises** in one's relations with others, rather than something that one holds. For some actors, exercising power means that they are able to lead others to action.

In this balance of power, one actor might gain more depending on the advantages they have and mobilize, but no actor is totally without advantages with respect to another.

Is this inequality a barrier to partnership? It is a question of **re-establishing a more balanced relation**, since an actor without power is unable to act. Box 4 provides an example. The goal of partnering, for one actor, is not to coerce others to act for its own ends, but rather to create a context in which each actor mobilizes its assets for the greater good of the population. In what way? By recognizing each actor's strengths and responsibilities, and therefore their share of power. It is an exercise that requires constant vigilance to ensure that the partnership is innovative and effective, i.e., that the actors manage to coordinate or combine their knowledge, resources, and practices.

#### **Box 4     Establishing the rules of governance that shape power relations in an intersectoral committee**

A controversy has emerged about funding programs in a neighbourhood committee on which community and institutional actors sit:

- ▶ On one hand, local institutional partners are asking for governance that gives them more influence on the decision-making process regarding the granting of institutional funding.
- ▶ On the other, institutional actors must act as partners in the same way as the other network actors in order to preserve the community setting's autonomy and its ability to address local concerns in the interface with the institutional actors within the committee.

In this particular controversy, committee members took a moment to establish rules of local governance marking out the power relations. This was done so that the institutions, who structurally have more resources and assets, would not have more power in the partnership than the community organizations so as to ensure that the priorities would be those of the community and not of the institutions.

Source: Lefebvre, C., Bilodeau, A., Galarneau, M., and Potvin, L. (2017). *La production des effets de l'action intersectorielle locale: le cas de la Table de développement social de Pointe-aux-Trembles*. Montréal, Canada: Centre de recherche Léa-Roback. Found at [http://chairecacis.org/fichiers/publications/2017-11-29rapport\\_pat\\_final.pdf](http://chairecacis.org/fichiers/publications/2017-11-29rapport_pat_final.pdf)

## **4) WORKING WITH DIFFERENT LOGICS OF ACTION**

Each actor has its own culture and identity, perceives situations in its own way, and has its own logic of action. For example, the community-development approach in community action differs greatly from the targeted intervention with at-risk individuals or families that is favored in some public programs.

Managing to **combine** the knowledge, the logic of action, and the resources of the actors creates the **added value** of the action in partnership. This means examining the different logics of action, recognizing their specific contribution to the project, developing and **reinforcing**

**the convergences** that unite the actors, and seeking to **change the controversies** that prevent them from cooperating. The goal is to build new actions that are more global and promising than the existing ones. Box 5 provides a brief example of such a combination of knowledge and resources.

**Box 5 Combining knowledge and resources to produce new interventions adapted to context**

In intersectoral action, working groups produce documents (e.g., portraits, plans, project statements, briefs) that bring together the network's ideas. These documents act as intermediaries between the network and other actors it wishes to address. A Montréal neighbourhood committee produced a portrait of the most underprivileged areas in a neighbourhood, including the viewpoints of the people who live there. This provided a means for making other actors aware of the perspectives of the community and citizens. This portrait was presented to the elected officials to interest them in the needs of the community and to influence them. In this portrait, seniors mentioned wishing they had park benches on the neighborhood shopping street to walk to the grocery store. Elected officials agreed to include the idea in their planning and committed to having these park benches installed. These park benches contribute to active transportation and make access to the grocery store more economical (without taking public transport). They also promote neighbourhood life (e.g., through exchanges between neighbours).

Source: Lefebvre, C., Bilodeau, A., Galarneau, M., and Potvin, L. (2017). *La production des effets de l'action intersectorielle locale: le cas de la Table de développement social de Pointe-aux-Trembles*. Montréal, Canada: Centre de recherche Léa-Roback. Found at [http://chairecacis.org/fichiers/publications/2017-11-29rapport\\_pat\\_final.pdf](http://chairecacis.org/fichiers/publications/2017-11-29rapport_pat_final.pdf)

## 5) VALUING THE PRODUCTION OF INTERMEDIARIES AND THEIR USE

The collaboration between network actors takes place via different devices that circulate among them, that put them in contact, and that support and help define their actions. These devices thus act as intermediaries between the actors. These intermediaries can be:

- ▶ Writings, in hardcopy or electronic format, that convey knowledge and ideas (e.g., contracts, agreements, project statements, action plans, balance sheets, action models, briefs).
- ▶ Technical objects capable of performing linking roles between network actors, such as an audio recording or a communication tool (e.g., newsletter, neighbourhood newspaper).
- ▶ People in the role of spokespersons who convey specific ideas, knowledge, and know-how.
- ▶ Funding in the role of an instrument of exchange that represents the mutual commitment of the parties and that carries the rules of the grant in return for information or actions to be produced.



Intermediaries **connect** actors within networks and allow them to collectivize their ideas. The networks of actors are thus shaped through their interactions, which materialize in the intermediaries that they produce and circulate. This is the case of successive iterations of collective writing. These iterations link the actors, moving their thinking forward until a final form is reached.

The intermediaries **encode** the convergent meanings and actions that are established within the networks. They **materialize** the consensuses and **stabilize** them for a certain period. The intermediaries thus allow the networks to exist in the social space. They **circulate on behalf of the networks**, convey their ideas, and allow them to represent themselves to other actors or networks of interest. When introduced to other actors or networks, they can be used to advance action toward goals.

The progression of the collective action, its zigzags, its trials and errors, are expressed in particular through the succession of the intermediaries produced. The sequence of these intermediaries tracks the action as it is done. Reporting on collective action requires that this journey is traced rather than just looking at the end results. The journey determines the *how* of the collective action, its innovative processes, and the acquired collective knowledge. Box 6 illustrates, in a succinct manner, the path taken by an intermediary to achieve the final results.

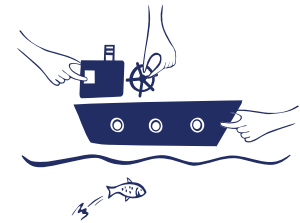
#### **Box 6     The production and use of an intermediary               in a greening project in a central Montréal neighbourhood**

A Montréal neighbourhood committee set up a working group to initiate the *greening* priority of its action plan. After taking inventory of the consultations already done, the working group was able to establish the state of affairs and the problems to be solved. The working group produced a brief (an intermediary) setting out objectives and priorities. This document conveys these objectives and priorities and acts as an intermediary with key actors in achieving the greening goals. Engaging and influencing key actors is necessary because the desired transformations depend on more than just the committee members. Members of the committee (acting as spokespersons) presented the brief to various networks and consultation bodies, to the borough council and to the neighbourhood's business round table. As a result, some companies were made aware of what they could do and committed to greening. For example, corporate parking lots have been greened, helping to reduce heat islands in the neighbourhood.

Source: Galarneau, M., Bilodeau, A., Chabot, C., Lefebvre, C., and Potvin, L. (2017). *La production des effets de l'action intersectorielle locale: le cas de la Table de développement social de Centre-Sud*. Montréal, Canada: Centre de recherche Léa-Roback. Found at [http://chairecacis.org/fichiers/publications/2017-11-29rapport\\_centre-sud\\_final.pdf](http://chairecacis.org/fichiers/publications/2017-11-29rapport_centre-sud_final.pdf)

# Part four

## Seeking to move controversies forward



The composition of the partnership, as well as the definition of the problem and courses of action, can raise issues and give rise to controversy, i.e., **competing positions among the actors**. Controversy is often at the heart of innovation development. It can evolve without confrontation through ideas being debated within the groups of actors. Exacerbating controversy can be avoided by conducting collective processes that take into account—thanks to sound knowledge of the field of action—the actors and their historical conflicts. Working in partnership does not require resolving all the historical and new areas of controversy that divide actors. Rather, it is a matter of identifying a **zone of sufficient convergence** to develop a relevant action.

### RECOGNIZING CONTROVERSIES

Controversy **goes beyond misunderstanding or disagreement**, which are manifested by an exchange of divergent statements between the actors in a network. Controversy is distinctive in that it is an **argued discussion** on a given situation, phenomenon, problem, or approach to action. Controversy brings together divergent elements of the debate on a specific issue.

For example, the following disagreements within networks of actors are not, at first glance, controversies:

- ▶ Misunderstandings or misconceptions arise due to poor information sharing.
- ▶ Partners have different ways of working and do not have the same organizational culture or the same work rhythm, leading to disagreements.
- ▶ Tasks that are not appropriately distributed among partners or an imbalance in workload generate tensions.
- ▶ The partners pursue goals that, although legitimate, become incompatible and can hardly be achieved in the pursuit of joint action;
- ▶ Problems arise with respect to the management of funds or transparency in the conduct of collective action.

There are many **sources of controversy**:

- ▶ complex problems
- ▶ solutions that are not well known
- ▶ new uncertainties related to new problems
- ▶ differences of interest or vision
- ▶ conflicting knowledge
- ▶ different views on the possibilities and constraints in the environments, etc.

Controversy is the **confrontation of various competing interpretations of the same phenomenon** or the same issue. Controversy involves making a social reality explicit, documenting and revealing it. This process is usually accompanied by a mobilization of actors who consult, contradict each other, and counter-argue in the collective space. Controversies often lead to the production of new knowledge, new rules, new instances, new identities, or new paths of action.

Since controversies within networks of actors raise issues of power, values, identity, or logics of action, they mobilize scientific and political elements in an intermingled manner. They are often the focus of opposing forces that seek to direct the pathway to their resolution.

There are **three ways of looking at controversy**:

- 1) The **juxtaposition** of visions without addressing the controversy, in which actors minimize their contacts or reduce them to noncontroversial objects.
- 2) The resolution of a controversy **from a single vision**, based on the primacy of the vision of the actors in control.
- 3) The handling of the controversy aiming at **making it evolve towards a new outcome** (new knowledge, rules, ways of action) in the direction of the common good.

Avoiding controversies is not constructive. When they persist within the network of actors, there are **signs that indicate avoidance**, for example:

- ▶ some of the actors are less assiduous, become demobilized, or gather in other places;
- ▶ delinquent practices occur during meetings, such as having parallel conversations on different topics at the same time;
- ▶ the network fails to make decisions on even minimal issues;
- ▶ the network fails to produce anything to advance the action (e.g., intermediaries); or
- ▶ the purpose of the partnership gradually dissipates and the network no longer supports the collective project.

The need to understand the issues and the demands of discussion in action networks lead to a positive view of controversies. In a problem situation, controversy allows the actors involved to examine who the other actors are, what knowledge is held by which actors, what aspects of the situation need to be considered, and what courses of action can be taken, thus enriching the understanding of the situation. The next section outlines ways to navigate these issues and deal with controversies.

## DEALING WITH CONTROVERSIES

To make progress when working in partnership, it is necessary to emphasize **what unites** the actors, as well as **what divides them**, and to use the controversy as **material** to build new solutions. Seeing the other actor as a social actor rather than viewing the situation as an interpersonal conflict is more beneficial. That is only possible if all views can be expressed and if they are treated equally. All points of view must be heard with equal attention. That does not mean, however, that they have the same value in moving the controversy and collective action forward. To this end, three approaches are proposed.

### Figure 3. Three ways to move controversies forward

- 1 Outline the controversies** to identify the points of disagreement between the actors
- 2 Generate actor movements** through negotiation and learning
- 3 Reconfigure the network** by engaging new actors, strengthening certain ties, and dropping others within the network

## APPROACH 1: OUTLINE THE CONTROVERSIES

Outlining controversies means describing them in depth, breaking them down, putting them on the table. The portrait of a controversy is provided by the **arguments** of the actors, deconstructed and explained by their **social position**, their identity, their **interests**, and the stakes that mobilize them in a given situation and at a given time. The tool **Portrait of a Controversy**, used in Box 7, serves this purpose. This tool, used repeatedly over time, makes it possible to capture the formation and transformation of actors' arguments and to follow the controversy's evolution. There are four steps to the process.

### 1. Distinguishing between controversies

Controversies—often two or three in a project—can be intertwined in the exchanges between actors. The challenge is to **distinguish** and **identify the arguments specific to each**.

## 2. Distinguishing between the arguments of each actor and the interests at stake

Distinguishing the arguments of each actor and the interests at stake helps to understand each controversy. **Connecting the arguments** of the actors to their social position, identity, interests, and the issues that mobilize them in the given situation helps to grasp their meaning.

## 3. Distinguishing between types of arguments

The arguments defended by the actors generally relate to **values, scientific knowledge, or experiential knowledge**, which constitute the basis of their action. The arguments related to values reveal the principles that guide action. For example, for the public actor, these are often the principles of efficiency and equity; for the community actor, these are generally the principles of mutual aid and solidarity. Scientific-knowledge arguments are derived from research, for example, judging the effectiveness of a program based on a systematic assessment. The arguments relating to experiential knowledge reflect the professional experience and the practical knowledge of the actors. For example, an actor considers an action relevant to a setting because it has been successful elsewhere. Values, scientific knowledge, and experiential knowledge shape the actors' logic of action.

## 4. Confronting arguments of the same type

The portrait of the controversies facilitates the debate by allowing the confrontation of arguments of the same type: values, scientific knowledge, or experiential knowledge.

### Box 7 Controversy surrounding the coordination of funding programs in Montréal's early childhood field during 2008–2015 <sup>1</sup>

This controversy involves, on the one hand, funder autonomy (governmental and philanthropic) in establishing programs, each with their own rules for planning and accountability; and, on the other hand, the addition of siloed funding programs that target related goals among the same populations and that require implementation by local intersectoral committees. These committees call on regional sponsors to ensure that programs are coordinated and complementary. Three classes of actors were involved in this controversy.

1 Five local collaborative action funding programs were underway: *Services intégrés en périnatalité et pour la petite enfance – volet Création d'environnements favorables* (ministère de la Santé et des Services sociaux); *Programme d'aide à l'éveil à la lecture et à l'écriture* (ministère de l'Éducation); and three programs in partnership between the Québec Government and the Fondation Lucie et André Chagnon: *Québec en forme* (ministère de la Santé et des Services sociaux), *Avenir d'enfants* (ministère de la Famille), and *Réunir-Réussir* (Secrétariat à la Jeunesse).

Given their public–philanthropic partnership (PPP) agreements, the **government ministries** and the **philanthropic actor** were in a position to set public policy and programs and funding. Thus, the challenge for them was their ability to exercise control over program directions and governance, to demonstrate the isolated impact of each program, and to ensure the soundness of management control rules at the regional and local levels in order to meet the accountability requirement. The central values mentioned by these actors in support of the sectoral operation of the programs were autonomy in establishing the directions and rules governing program funding and reporting as well as accountability in managing public funds. Ministerial actors had experience with a highly sectorized institutional culture that imposed itself on their philanthropic partner. In response to the need for program coordination and complementarity expressed by local communities, the government and PPPs experienced a few unsuccessful exchanges. As for the three PPPs, their exchanges led to linkages that somewhat alleviated the administrative tasks of local authorities.

The **actors of the regional intersectoral committee** were in the position of regional sponsors of funding programs. Given their position in the middle, they were mobilized by two concomitant issues: (1) their obligation to effectively relay program management requirements to local actors and to report on the use of funds to the ministries and PPPs; and (2) the exercise of their decision-making margin in support of local-program coordination initiatives originating from local authorities. Like their governmental superiors, they upheld the values of autonomy and accountability, while asserting their regional decision-making authority in supporting local-program coordination initiatives. They had experience in successfully negotiating local coordination arrangements mitigating the effects of sectorization while respecting the autonomy of individual programs.

The **local intersectoral committees** were responsible for implementing the programs. The challenge for them was to achieve progress in regional program coordination (e.g., unified planning and reporting frameworks) and complementarity in response to their repeated requests for this. In terms of values, these actors emphasized the importance of local consultation as a privileged place for mobilizing around objectives and projects meeting the needs of their community, for concerted bottom-up planning and for ensuring the coherence of local actions. Their experience with stacked programs—each with its own rules—challenged this dynamic, leading to the following consequences: the addition of local consultation structures; increased planning and reporting; the primacy of program parameters over the response to local needs; and the focus on the planning function and the weakening of the consultation bodies. Scientific knowledge was also evoked to corroborate the local consequences of program stacking.



## Portrait of a Controversy tool

Actor	Social Position Identity	Interests Issues	Arguments related to:		
			Values	Scientific knowledge	Experiential knowledge
Government ministries Public-philanthropic partnerships	Establishment of public policies and programs. Funders.	Monitor program direction and governance. Demonstrate the isolated impact of each program. Ensure the soundness of local and regional management control rules.	Autonomy. Accountability.	Nil	Highly sectorized institutional culture within ministries.  Exchange on program coordination: unsuccessful between government and PPP; slight administrative relief between the 3 PPPs.
Actors of the regional intersectoral committee	Regional sponsors of funding programs.	Convey program management requirements to local actors. Provide accounting for the use of funds. Exercise their decision-making authority in supporting local coordination initiatives.	Autonomy. Accountability. Regional decision-making margin.	Nil	Successful negotiation of local coordination arrangements that mitigate the effects of sectorization, while respecting program autonomy.
Local consultation bodies	Program implementers.	Repeated requests for regional coordination and complementarity of funding programs.	Autonomy. Collaborative planning around neighborhood goals. Bottom-up planning and coherent local action.	Scientific writings corroborate experiential knowledge (Bourque, 2008; Divay, 2009).	Addition of local consultation structures. Increased planning and reporting. Primacy of program parameters over response to local needs.  Focus on the planning function and weakening of the consultation body.

Source: Bilodeau, A., Laurin, I., Clavier, C., Rose, F. and Potvin, L. (2019). Multi-Level Issues in Intersectoral Governance of Public Action: Insights from the Field of Early Childhood in Montréal (Canada). *Journal of Innovations Economics & Management*, 30(3), 163-190. doi:10.3917/jie.pr1.0047.

## APPROACH 2: GENERATE ACTOR MOVEMENTS

Can a viable outcome be reached in the face of controversy? Yes, if the actors move, that is, if they **modify their initial positions on their visions, their roles, or their practices**. Exploring the controversy pushes each actor to revise their position, objectives, vision of the situation, or logic of action. The actors clarify their positions when confronted with the realities and viewpoints of the other actors. Responding to the other's arguments can lead to a revision of one's position. It should be noted that, in this exercise, defending one's point of view at all costs or staying on the sidelines of the debates often result in marginalization. These are relatively unproductive attitudes that few actors adopt.

Scientific and experiential knowledge can be moved more easily, as new data can be used to resolve differences. When values come into play, the situation is clarified by explaining how values are related to one's social position and identity. Once this space for dialogue has been created, everyone's vision becomes more nuanced.

During the course of the controversy, the identity of the actors and their positions are redefined, allowing the controversy to evolve. The controversy causes the actors as a whole to take a fresh look at the situation. This leads to movements among the actors and allows them collectively to innovate and progress towards new solutions. Controversy, rather than being an insurmountable obstacle, can lead to more appropriate ways of understanding and acting. **Innovation is built by resolving controversies.**

Resolving a controversy stabilizes an issue for a certain period of time and allows the community of actors to progress in the action. The handling of a controversy is productive if it succeeds in stabilizing a network of actors carrying a body of knowledge and projects. This does not mean that all conflicts get resolved or that all differences get ironed out. This means that a space for redefining the common interest has emerged, allowing the development of collective projects. Box 8 provides an example of a controversy that evolved through the debate of ideas among the community of actors, leading to shifts among them to an outcome that achieved their priority objectives.



## Box 8 Discussion of ideas related to a collective food-supply project

Improving access to healthy food for all is a central objective of the neighbourhood committee Saint-Michel in Montréal. Historically, one of the ways of achieving this has been through the deployment of buying groups within two large community organizations in the neighbourhood. At its core, a group buying scheme should allow its participants to access lower food costs through the increased purchasing power of the group of individuals. A collective project, *Ma boîte à provisions*, initiated in 2013, brings these purchasing groups together in a large collective procurement project open to all the neighbourhood citizens. This shift in the actors was facilitated by the funder, who supports concerted initiatives that can be stabilized, particularly by creating links between several organizations and opening up collective purchasing to the neighbourhood's entire population.

This development brings together two perspectives on collective food supply. The first refers to small-volume purchasing groups within each community organization for its most disadvantaged members. The second extends group buying to the entire population of a neighbourhood in order to increase the volume of purchases and obtain better prices from wholesale suppliers. This requires large-volume facilities (warehouse and cold storage) and challenges the limited capacity of neighbourhood facilities. Within the *Ma boîte à provisions*, all the partners agreed to move towards a single collective purchasing group open to the whole neighbourhood. Some important issues, however, remain, such as: What is the primary objective of collective purchasing? Which customers should be served first? What does food affordability mean? Two points of view are under discussion: one argues that the service will be affordable if it allows emergency-food users to find value in migrating to the service; the other considers that *Ma boîte à provisions* already offers good prices on several products and that targeting emergency-food users is a difficult goal to achieve.

Affordability is a must, since the project's primary objective is that all the neighbourhood citizens, including the poorest, should be able to benefit from ordering through the service. The partners agree that (1) the small order volumes of a purchasing group solely for disadvantaged organization members limit access to more affordable suppliers; and (2) offering all residents the opportunity to shop in solidarity can have a downward impact on prices. They finally continued their collaboration around the following outcome: increasing the number of users and increasing the storage capacity (warehouse and cold storage) are two inseparable requirements to increase the purchasing power that leads to greater product affordability. The development of new ordering points, an online purchasing platform, canvassing of suppliers offering better prices, and the quest for storage solutions are the avenues of action deployed by the partners to work towards affordability.

Source: Chabot, C., Bilodeau, A., Martin, N., and Potvin, L. (2022). *La production des effets de l'action intersectorielle locale sur les milieux de vie. Le cas Ma boîte à provisions de la Table Vivre Saint Michel en santé*. Montréal, Canada: Canada Research Chair in Community Approches and Health Inequality, Université de Montréal. Found at : <https://numerique.banq.qc.ca/patrimoine/details/52327/4541531?docref=1QwngvjBoKsvgzvg25j5Vw>

Two tactics are likely to lead to actor movement: negotiating compromises—often with the help of a mediator—and learning.

## 1. Compromise

The most common tactic is to negotiate a compromise. It often causes friction, with each person attempting to influence the collective decision and define their place. This arrangement is based on **mutual concessions**, rather than on renunciation or compromising. Actors agree to a compromise in order to reach a goal they share with other actors and that cannot be reached alone. Box 8 provides a good illustration of this.

**Compromise is often synonymous with mediation.**<sup>2</sup> Considered impartial, a mediator helps the parties reach an agreement, but has no power to impose a settlement. Rather than hiding differences, mediation helps to expose diversity by focusing on the common good. This role is assumed by an internal actor in a leadership position or by an external actor. The mediator must, of course, be legitimate and credible in the eyes of the partnership's actors:

- ▶ The mediator's **legitimacy** is granted by their formal position in an organization (e.g., community organizer or development officer) or by a mandate conferred democratically by a group of actors (e.g., coordinator of an intersectoral committee).
- ▶ The mediator's **credibility** is granted by the others who recognize the mediator's knowledge of the specialized languages specific to the different logics of action, of the places of passage among the actors, and its capacity of mediation.

## 2. Learning

Learning is progressive through the **exchange of ideas** and the **confrontation of viewpoints** conducted in collective spaces. Learning is a central mechanism in actor movement. Controversy brings together different types of knowledge (scientific/experiential; expert/lay). The debate within the actor network makes this knowledge mutually enriching. Moreover, the debate in citizen spaces allows larger audiences to understand the issues and gain and knowledge.

Three conditions must be met for learning to occur:

1. everyone has knowledge that they share;
2. there is an exchange of points of view; and
3. the power in the relationship is transformed. Indeed, when one has the opportunity to question the other's justification, the hierarchical relationship changes.

2 The fifth part of the manual is entirely devoted to the role of mediators in collective action.

### APPROACH 3: RECONFIGURE THE NETWORK

The resolution of controversies can also involve the reconfiguration of the network of actors:

1. the **engagement of new actors** who introduce new points of view, new knowledge, and new resources;
2. the **strengthening** of certain ties; and
3. the **dropping of others**, i.e., the withdrawal of certain actors.

The insight provided by the addition of new actors, with new knowledge and arguments, leads to a realignment of positions and interests among the actors involved. This requires that these new actors be adequately integrated and that they can take their place in the collective dynamic to contribute to it. This leads actors to articulate their courses of action differently and to develop new, more robust solutions that allow them to improve their cooperation while, at the same time, at least partially satisfying their interests.

The evolution of the controversy leads to the selection and withdrawal of actors and arguments as interests align and positions and arguments coalesce and refocus. The evolution of the controversy thus reconfigures the network and the relationships between the actors. Box 9 illustrates such a process.

#### **Box 9    Change in leadership in integrated social development in a semi-rural area of Québec**

Since the 1980s, integrated territorial development has been an important part of community development. Through intersectoral consultation mechanisms, the communities aim to develop a coherent vision of their development and strategies to coordinate their actions. In a semirural area, faced with the changes brought about by the Québec Government, notably the abolition of CRÉs<sup>¶</sup>, CLDs<sup>£</sup> and CSSSs<sup>§</sup>, as well as the end of funding for ATI<sup>¶</sup>, a group of development officers (from CSSS community organizers, CLD and school-board) initiated a process of collective reflection aiming to maintain an integrated territorial concertation in spite of these changes.

The partner's board of the CSSS initiated the process with an initial proposal regarding the territorial leadership to be assumed by the institutions (CSSS, CLD, CS<sup>N</sup>) in economic and social development. It received little support, especially from MRCs<sup>III</sup> and development officers. The group of development officers sought to safeguard the gains of the ATI in terms of convergence of actions by proposing the harmonization of three youth consultation bodies to develop a territorial approach. A second proposal from the partner's board of the CSSS corresponding to its structure and interests, defined cooperation according to its client programs. It was not more successful in garnering support, particularly from community organizations, which would only be represented at program consultation meetings, if they had a delegation.

The group of development officers then submitted a proposal developed with the MRCs (which integrated the CLD officers) and supported by all the ATI partners. It focuses on preserving ATI structuring assets and proposes to continue working on the priorities already established, namely (1) the harmonization of development initiatives and consultation bodies; and (2) territorial projects to fight poverty (food, housing, transportation, school perseverance). On this basis, funding was granted under the *Alliances pour la solidarité in the Plan d'action gouvernemental pour la solidarité et l'inclusion sociale*. The ATI Assembly has become a determining factor in the integrated social development of the territory, which is now one of the responsibilities of the MRCs. As for the partner's board, the loss of local roots of the CIUSSS and the more rigid context of Bill 10§ mean that it is refocusing on health issues. The community's leadership in the area of social development has therefore shifted from the health and social services sector to the municipal sector.

<sup>¶</sup> CRÉ: Conférence régionale des élus / Regional board of elected representatives.

<sup>£</sup> CLD: Centre local de développement / Local development center.

<sup>§</sup> CSSS, CISSS and CIUSSS: The health and social services centres were merged into integrated (university) health and social services centres subsequent to the adoption of the *Act to Amend the Organization and Governance of the Health and Social Services Network, in particular by abolishing the regional agencies* (Bill 10) by the Québec National Assembly in February 2015.

<sup>¶</sup> ATI: Approche territoriale intégrée, régionale et locale, de lutte contre la pauvreté / Integrated regional and local approach to poverty reduction implemented by the Québec Government.

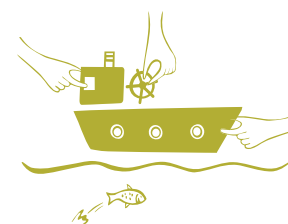
<sup>^</sup> CS: Commission scolaire / School board.

<sup>≡</sup> MRC: Municipalité régionale de comté / Regional County Municipality.

Source: Parent, A.-A., Lachapelle, R., Bourque, D., and Jetté, C. (2016). *Pratiques de développement territorial intégré. Organisations et territoires*, 25(2), 19-27. <https://doi.org/10.1522/revueot.v25n2.311>

# Part five

## The role of mediators in collective action



The interdependence of the sectors involved in intersectoral action networks implies places where common rules and practices and collective action are developed and stabilized. These are places where various actors can express themselves, negotiate, and broach controversies. They mobilize disciplinary, professional, and sectoral knowledge and try to negotiate common understandings from their respective viewpoints.

In these places, mediation practices **bridge the gap** between actors with different, sometimes divergent, interests, but for whom working together and cooperating are common interest. These practices increase in complexity as the diversity of actors participating in the collaboration grows, whether the actors are from government, associations, or the private sector, and from different levels of public action.

These bridging practices are often carried out by the coordinators of collective initiatives or professionals who accompany these initiatives, particularly in a leadership or support role (e.g., community organizer, development officer, or liaison officer). They contribute to circulating perspectives between actors and support the formulation of compromises on the issue of interest.

### THE MEDIATOR'S KNOWLEDGE AND SKILLS

In these places, many actors must learn to navigate from one sector to another, from one level to another, to use several inventories of knowledge and to negotiate with different interlocutors. The knowledge required of the mediator therefore includes **mastery of the languages** mobilized related to the problems and courses of action. It is to the mediator's advantage to be **familiar with the contexts and the actors**, the history of their relations, their interests, and the issues that mobilize them, so as to grasp the conflicts that divide them and to facilitate the emergence of convergences among them.

These places also require the mediator to have skills such as listening, advocacy, democratic leadership, communication, negotiation, coordination, and mobilization. The mediator's skills refer less to their ability to impose a point of view than to their **ability to mobilize partners, produce**

**arguments, formulate a shared representation** of a situation, and **outline compromises and solutions acceptable** to all. The mediator's role is to conduct activities that bring actors into the game of mediation between several sectoral worlds.

## WHAT DOES THE MEDIATOR DO?

The mediator brings to the forefront the objective that justifies the network of actors. The mediator seeks to bring everyone to share and clarify their vision of the problem and possible courses of action. Often, new facets of the situation emerge, enriching the portrait. The mediator **creates convergences** around shared objectives or complementary strategies. They seek an **adequate compromise** that the actors can commit to and not a generalized or final settlement of disagreements. Focusing on the best interests of the population helps to channel discussions and decisions into a common area of action. The mediator can also encourage **alliances** by involving a new partner or by targeting actors for a limited project, if a controversy proves too difficult to resolve.

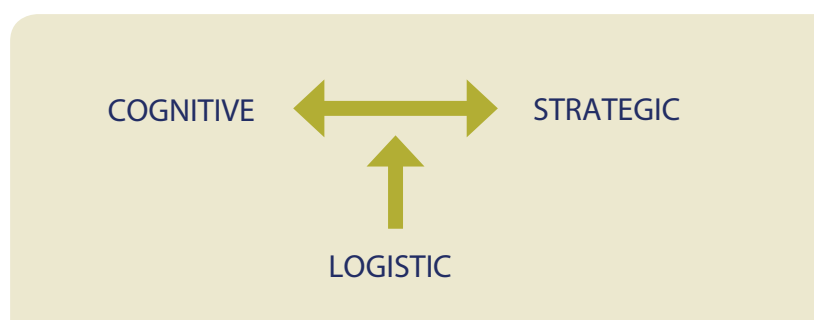
Four roles of the mediator can be combined:

- ▶ The **mediator as negotiator** identifies the interests and needs of the parties. The mediator seeks to reach solutions that meet as many needs and interests as possible, but avoids making its own recommendations to preserve its neutrality and ensure that the parties retain control over the outcome.
- ▶ The **mediator as advocate** intervenes primarily to ensure that all parties are adequately represented and participate fairly in the decision.
- ▶ The **mediator as evaluator** focuses on the solution and suggests ways to reach an agreement.
- ▶ The **mediator as transformer** aims to improve the relationship between the actors rather than to obtain an agreement.

## THREE TYPES OF MEDIATION PRACTICES

Three types of mediation practices contribute to performing these roles: cognitive, strategic, and logistical practices. Box 10 provides an illustration of these practices.

**Figure 4. Three types of mediation practices to support action**



## 1. Cognitive practices

These practices lead to the **construction of a common meaning** between the actors involved in intersectoral action, even though they do not initially share the same knowledge or the same vision of the problems and courses of action. For example, building a shared understanding of a social problem for which the discourses of parties clash (experts, practitioners, associations, community organizations, elected officials, and so on). These practices consist of the following:

- ▶ Gathering viewpoints, interpreting knowledge, understanding opinions and beliefs, connecting them, and move them from one universe to another.
- ▶ Creating opportunities for dialogue to bridge the gap between the cultures of the participating settings.
- ▶ Finding equivalences, a common language, building representations understood by all using values and ideas that can be shared.
- ▶ Formulating and reformulating the successive representations of the question of interest, as it is co-constructed among the actors, so that it makes sense to them.

## 2. Strategic practices

These practices support interactions among actors, who are socially situated and bearers of interests. The mediator seeks to engage the actors in each sector to reconcile their objectives or interests with those of the other sectors to **reach an agreement that constitutes a step forward** from the perspective of their sectoral interests and the public interest. These practices are:

- ▶ construction of a balance in power relations;
- ▶ actions that maintain the interest of actors; and
- ▶ matchmaking actions aimed at reaching a minimum agreement on the terms of discussion and the benefits to be gained by each party, with a view to achieving balanced arrangements.

### 3. Logistic practices

These practices are for **coordinating** collective action. For example, the organization of events that make it possible to plan and carry out collective action among a wide variety of actors. Logistic practices are essential to achieving strategic and cognitive practices:

- ▶ setting up committees and organizing operations;
- ▶ maintaining informal relationships with and among actors;
- ▶ creating communication tools (report, brochure, diagram, modeling, etc.);
- ▶ managing activity schedules and deadlines;
- ▶ supporting the implementation of the other two types of practice.

#### Box 10 Urban cafés to consult citizens on their needs in a Montréal neighbourhood

As part of the citizen participation process on the neighbourhood committee, urban cafés were held to share the statistical portrait of the territory—and its three disadvantaged areas—as well as to consult citizens. A great deal of thought and planning went into the activity.

On the **cognitive** level, the consultation aims to develop an understanding and vision of the neighbourhood. It relates to the purpose of urban cafés: Why or for what reasons do we want to have the citizens' point of view? What will we do next? What role do we want citizens to play? Beyond preparing and discussing the statistical portrait, the content of the invitations and their wording were carefully discussed: What message do we want to send? For what activity are they requested? During the discussions, an idea emerged—which was unanimously supported—to consult young people and adults. In addition, urban youth cafés are held in schools and at the Centre jeunesse-emploi, since dropping out of school and finding a job are issues in the territory. Thus, the direction of the project has become clearer. Citizens are consulted—not as clients who come to the City Hall with requests—but as citizens who want to provide input, get involved in their community, and take responsibility; in other words, as agents of change.

On the **strategic** level, the central question is how to optimize citizen participation in the cafés. Mobilization strategies have been discussed, such as location and time (daytime or evening), and inviting citizens (door-to-door cards; items in the local newspaper; and working with schools).

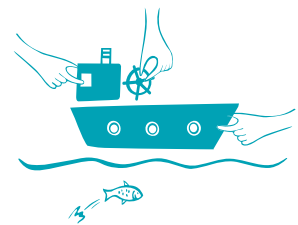
On the **logistic** level, how is this type of consultation carried out? Observation of similar approaches by other neighbourhood committees provides some guidance. The logistics of the cafés will be worked out as the experiment progresses. As the urban cafés are designed, links are forged between the partners who invest their resources and take on roles in the producing the cafés.

Source: Lefebvre, C., Bilodeau, A., Galarneau, M., and Potvin, L. (2017). *La production des effets de l'action intersectorielle locale: le cas de la Table de développement social de Pointe-aux-Trembles*. Montréal, Canada: Centre de recherche Léa-Roback. Found at [http://chairecacis.org/fichiers/publications/2017-11-29rapport\\_pat\\_final.pdf](http://chairecacis.org/fichiers/publications/2017-11-29rapport_pat_final.pdf)



# Part six

## Creating the conditions for effective partnerships



### SIX CONDITIONS FOR EFFECTIVE ACTION IN PARTNERSHIP

- 1) Inclusion of a diversity of perspectives on the situation
- 2) Early involvement of partners
- 3) Engaging actors in negotiating and influencing the decision
- 4) Involvement of strategic and critical actors in the project
- 5) Equalization of power relations
- 6) Co-construction of collective action

Several studies of partnership practices have led to the identification of six conditions that promote their effectiveness. The first four relate to the **participation dynamics**. Since the partnership is a space for participation, there must be sufficient momentum to work together. These conditions are:

#### 1) **Inclusion of a diversity of perspectives on the situation. Who is involved?**

Participation should be broad enough to **bring together a diversity of views** of the situation, so as to increase the area of convergence among the actors.

#### 2) **Early partner involvement. At what stage are they involved?**

The actors must be introduced at the earliest stages of action development so that they can contribute to broadening the information that informs the decision. They should be **mobilized for strategic choices** (what are the goals and strategies of the policy or program?) and not only for operational choices (how to implement the solutions).

### 3) **Engaging actors in a role of negotiating and influencing the decision. Who controls the decision?**

All partners must be involved to a degree that goes beyond consultation and **engages them in negotiation** so that they are in a position to influence the decision.

### 4) **The commitment of strategic and critical actors for the project. Are the actors and resources necessary for the action mobilized?**

The **critical** actors (without whom action cannot be taken) and strategic actors (who are required to elicit the participation of other essential actors) actors must be mobilized. Partners must be in a position to make decisions and commit resources; the resources essential to carrying out the action must be mobilized. In addition, the partnership must be stable and capable of involving other actors required to move the action forward.

If partner participation is limited to operational choices, the actors will have little room to maneuver in guiding the decision. If participation is only consultative, it falls to the decision-makers to ensure that the information obtained is translated into action. Interactive participation, however, provides for negotiation and influence. This is the best way to do it, because the quality of the action goes hand in hand with the sharing of information and decision-making.

It is therefore a question of creating sufficiently dynamic participation, i.e., one that allows for the exchange of a diversity of perspectives in order to broaden the choices. This can be achieved by bringing partners into the picture early, giving them a place in strategic decisions, and recognizing their role in negotiation and influencing. **With this dynamic in place, the last two conditions can be met.**

### 5) **The equalization of power relations. Does the partnership intentionally work to equalize power among the partners?**

A dynamic of interactive participation—implemented early on—is conducive to promoting the **transformation of power relations**, if the partners want to reduce the effect of the gaps due to their social position. How can that be achieved?

Actors with more assets give others room to assert their positions, act as equals, and reap real benefits from their collaboration. This is possible if three conditions are met:

- ▶ The principles of **reciprocity** and **equity** are adopted. In other words, everyone participates equally in the decision and all perspectives receive equal attention, regardless of the social position of the actors.
- ▶ **Local structures** and actor **autonomy** are respected.
- ▶ The **assets** of each participant are recognized, through fair recognition of each person's contribution and equitable distribution of benefits.

The equalization of power relations allows actors to combine their knowledge, practices, and resources. As the action is developed, knowledge, practices, and resources can be lost if power relations are not equalized. One of the conditions for innovation is to have information from different points of view. In order for this information to be used, however, everyone must be able to put forward their knowledge and practices.

The equalization of power relations is recognized in common spaces and rules where actors can find concrete signs of their influence and interdependence.

## 6) **Co-construction of collective action. Does the partnership promote the combination of knowledge, practices, and resources of the partners?**

- ▶ The co-construction of collective action is the **combination** of knowledge, practices, and resources of the partners. This is done by strengthening the convergences that bring actors together and by addressing the controversies that prevent them from cooperating, such as:
- ▶ Discussing a **diversity of viewpoints**, allowing a broadening of the possibilities of action.
- ▶ Opening **discussions on the differences** and supporting their development.
- ▶ Reaching **beyond the specific interests** of each actor to converge on the common interest of the targeted populations.
- ▶ Modifying the actions of each actor to **build more integrated solutions**.

On this basis, co-constructing collective action means examining the different logics of action, recognizing their value, and seeking to build new, more global, more promising actions than the mere coordination of existing actions.

The co-construction of action is recognized when progress in thinking and acting is a direct result of the combination of the partners' knowledge and assets. This combination creates the added value of action in partnership.

These six conditions for effective partnership are facilitated if time is spent on **maintaining the partnership**, that is, on **maintaining the interpersonal relationships between the actors and not just the collective project**, through a variety of means that maintain communication and trust.

## TOOLS TO SUPPORT ACTION IN PARTNERSHIP

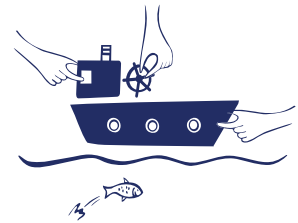
The *Self-evaluation Tool for Action in Partnership* is a collective self-assessment tool based on best practices. It is used to assess the degree to which the six conditions for effective action in partnership outlined above are met. The tool is easy to use. It consists of 18 items that are answered by choosing among three options, from the strongest to the weakest position. The online version produces a compilation of the responses.

- ▶ The French-language version is available at:  
[http://chairecacis.org/fichiers/bilodeau et al. 2008 2014 outil diagnostique action en partenariat 0.pdf](http://chairecacis.org/fichiers/bilodeau_et_al._2008_2014_outil_diagnostique_action_en_partenariat_0.pdf)
- ▶ A web presentation is available at:  
<https://www.youtube.com/watch?v=wVO3LCZjAu4>
- ▶ The English-language version is available at:  
<https://chairecacis.org/fichiers/selfevaluationtool.pdf>
- ▶ A web presentation is available at:  
<https://www.youtube.com/watch?v=sq7AQEPEjOc>

The *Partnership Assessment Wheel* is based on the Socratic Wheel technique. It serves to facilitate a collective reflection activity on partnership. Participants who have completed the *Self-evaluation Tool for Action in Partnership* can use the *Wheel* to share their assessment for each of the six conditions and compare their views in a dialogue setting. The visual is an appropriate way to see the strengths and weaknesses of the partnership in order to identify areas of improvement for the continuation of the partnership. The game-like context of the *Wheel* facilitates equitable exchanges between participants.

- ▶ *The Partnership Assessment Wheel* is available online at:  
[https://chairecacis.org/fichiers/roue\\_socratique\\_anglais.pdf](https://chairecacis.org/fichiers/roue_socratique_anglais.pdf)

# Conclusion



Intersectoral collaborations and partnerships are strategies for developing new responses to societal problems for which existing interventions are considered insufficient or inadequate. It is therefore a space for innovation. In order to innovate, we discussed different strategies aimed at building new solutions within the networks of actors. Six conditions for partnerships to produce new and more appropriate responses were also reviewed.

Developing an innovation along with ensuring its survival and deployment is demanding. The agreements reached by the actors must take shape and be stabilized for a certain period of time in the action systems in order to produce tangible effects for the populations. Stabilizing compromise or agreement among actors around a project is done by solidifying alliances and mobilizing resources. Once implemented, innovation must still develop and improve. The strength of a project depends on the strength of the network that supports it. The strength of the network as well as its capacity to grow and solidify its alliances, depends on the project's anchoring in the community and its ability to respond adequately to needs.

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