Tool 3

Exploring partnerships: the external scan

About this tool

As you consider different approaches for embedding financial empowerment (FE), a good starting strategy is to explore opportunities for collaboration and partnership. Community partners may already have experiences as well as staff, skills and systems in place for delivery of financial help services and supports to vulnerable Ontarians. It can be more cost-effective and less resource intensive to leverage FE resources already in your service delivery area.

This tool begins with a scan of FE services located in your community and guides you through different steps to identify organizations / services that you can connect with and together explore how you might collaborate to deliver FE services that are most relevant for your clients.

What to do

1. Find FE services in your local community. Refer to **3A. Where to begin your FE community scan**.
2. Document your findings using **3B. Community scan findings**.
3. Identify organizations / services to explore possible partnerships with.
4. Gather deeper information about each potential partner using **3C. Taking a deeper dive** template.
5. Use **3D. FE Ecosystem** map to visually depict your findings.

3A. Where to begin your FE community scan

The resources below are a great place to start searching for FE services in your local community:

- Go to the **Prosper Canada Financial Empowerment Directory** to find financial empowerment organizations in Canada near you.
- **211** is Canada's primary source of information for government and community-based, non-clinical health and social services. You can look for ID clinic services, as well as other community support or advocacy organizations.
- Organizations that work with vulnerable populations, such as newcomers, seniors, and people with disabilities often have FE supports and services. Make sure to look into your local United Ways, settlement agencies and senior centres.
- The Community Volunteer Income Tax Program (CVITP) is a collaborative program between the Canada Revenue Agency (CRA) and community organizations. It helps individuals with modest incomes and simple tax situations to file their taxes for free. The clinics often have dedicated support for access to benefits as well. Search for a **CVITP clinic in your area**.
- Many non-profit organizations also offer tax-filing and benefits applications support to community members, among other supports. For more information **go to the Help feature on Prosper Canada's Benefit wayfinder tool**
- It's important to direct clients to non-profit credit counselling services. Refer to **Credit Counselling Canada** to locate nationally accredited non-profit credit counselling services in your area. Credit Counselling Canada also provides different financial literacy and education options.

3B. Community scan findings

In your search, you might come across:

- Organizations that offer stand-alone services e.g. a seasonal tax clinic at a library, a free financial planner at a hospital, a savings program at a housing nonprofit.
- Organizations that offer several FE services.

Document your findings below.

Organization Location

FE Service

Comments

Organization Location

FE Service

Comments

Organization Location

FE Service

Comments

Organization Location

FE Service

Comments

3C. Taking a deeper dive template

Do some digging and identify a contact for the organizations that seem most relevant to your clients needs. Use this template to gather more information about the organizations and services your team is interested in connecting with to discuss a potential collaboration and/or partnership.

In addition to a fact-finding mission, this activity – reaching out to community FE providers – is your first step in creating a new partnership or reinvigorating a prior relationship.

Note: You will need to duplicate the form for each FE organization you identify.
Complete one form for each FE organization.

Name of Organization

Website

Contact person

FE service information

FE programs/services provided
(e.g. financial coaching, tax filing, etc.)

Length of time providing the service

Client eligibility criteria

Target population

Client access

Cost

Location

Service hours

Referral process

Organizational capacity

Capacity to accept additional clients	☐ Yes	☐ No
Any existing relationship with OW?	☐ Yes	☐ No
Interest in partnering?	☐ Yes	☐ No

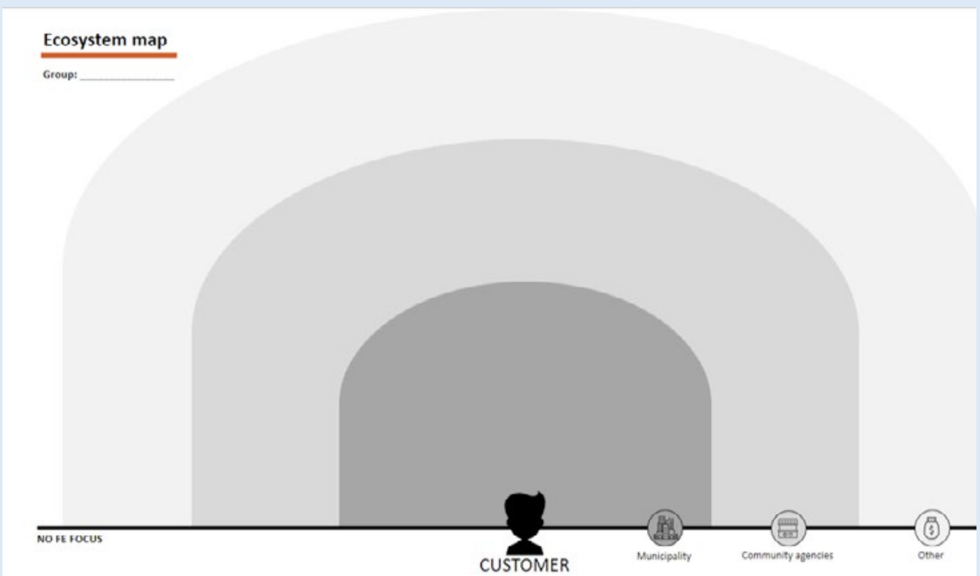
3D. FE ecosystem map

Either by yourself or in a team work session, locate the FE services and supports you have identified on the mapping tool below. Use what you know about community agencies – and relevant municipal providers – to place them on the map.

- Once you have named and placed them, note 1 or 2 key FE services/supports they can provide to your clients, or your team. Also consider what supports or value you might provide to them.
- You can have participants add notes to this map background.
- Reflect on your completed map as a team and use it to prioritize your outreach to the partners.

Sample mapping tool

Printable mapping tool can be found on the next page.



Ecosystem map

Group: ________________