



The **'How-To'** Guide to
Hospice Palliative Care
Twinning Projects

This publication was produced with funding from *Health Canada*.
The views expressed herein do not necessarily reflect the official views of *Health Canada*.

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Acknowledgements

The author would like to thank the following people for their contributions to this project:

Michael Sharpe
Manager, Palliative and End-of-Life Care Unit,
Chronic and Continuing Care Division, Health Canada

Peta Collings
Volunteer Resources Manager, *Hold Me Africa*

Wendy Pratt
Executive Director, Nanaimo Community Hospice Society

David Falk
Physician, *Hold Me Africa*

Ricardo Walters
Coordinator, The Salvation Army Africa
Regional Facilitation Team

Wayne Petersen
Executive Director, *Victoria Hospice Society*

Dr. Robin Love
Medical Director, Palliative Care Program,
Nanaimo Regional Hospital; International Network for Cancer Treatment and Research

The author would also like to thank those who agreed to read the early draft:

Doug McLaughlin
Volunteer, Hospice Calgary

Stuart Brown
Director Palliative Access (PAX) Program,
International Network for Cancer Treatment and Research

Leslie Sundby
Professor, Faculty of Nursing,
Malaspina University College

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INTRODUCTION

Making a Difference – one community at a time

Over the past several decades the concept of twinning has assumed increasing importance in the efforts of towns and cities across the globe to collaborate on broad range of social initiatives. In recent years, community palliative care professionals in Canada and other developed countries have adopted twinning as a means of sharing palliative care knowledge, skills and promising practices with colleagues in developing countries. Their efforts are contributing to hospice palliative care twinning initiatives that are making a real difference in the quality of end-of-life care in many communities around the world.

What is Twinning?

Twinning is a professional and social collaboration between organizations in different countries to achieve mutual benefits through combined efforts and a common vision.

1. THE PURPOSE OF THIS GUIDE

The purpose of this Guide is to assist Canadian organizations to develop hospice palliative care twinning projects with partner health care organizations in developing countries. The benefits of these projects – shared insights and experiences, intercultural collaboration and understanding – are important for palliative care practitioners, volunteers and supporters in Canada and elsewhere.

2. A PRACTICAL FOUR-PHASE APPROACH

The *'How-To' Guide to Hospice Palliative Care Twinning Projects* offers a practical four-phase approach to successful twinning, including: 1) advice on preparing your organization for the twinning opportunity

(with particular emphasis on volunteer input and participation); 2) choosing an appropriate twinning partner and setting up effective collaborative agreements; 3) implementing and managing your partnership relationship; and 4) reviewing your progress and evaluating your project and partnership success. Special features include a Twinning Progress Flow Chart; a step-by-step Project Plan; inspirational examples from previous twinning projects; and forms and legal documents to help you get started.

3. PRINCIPLES OF SUCCESSFUL TWINNING

So what are the guiding principles of successful twinning? The *'How To' Guide to Hospice Palliative Care Twinning Projects* asked veterans of successful twinning initiatives to share their principles for success. These principles fall into seven general categories:

1) Patience and Flexibility

Be open to letting the process unfold. Canadian expectations regarding planning, government functioning and communications may be different from those in other parts of the world.

Being open to process and recognizing uniqueness are underlying emotional and spiritual values of hospice palliative care. In other words, the same patience and flexibility that hospice palliative care workers offer to patients and families on a daily basis can be transferred to the twinning partnership itself.

2) Sensitivity and Respect

You must be open to examining your own attitudes and behaviour. Reflect honestly on your willingness to wait and watch (when appropriate), to learn from your twinning partner, to refrain from “fixing” and giving advice, and to become aware of assumptions or prejudgments. You must make a conscious commitment to be respectful at all times.

3) Sustainability

Plan your twinning project with sustainability in mind. If you begin with a big splash and then quickly drop out, you may do more harm than good. Sustainability may not necessarily mean long-term direct involvement; it means that people and resources are in place to continue effective programming after your personal involvement has ended. You should therefore work towards solutions that can be maintained in the long run without outside help.

4) Reciprocity

A twinning partnership is a reciprocal relationship. Each partner must identify what it wishes to gain from the partnership and what it has to offer. The challenge for the established organization is to share experience and expertise in a way that is empowering for the twinning

partner. Plan for an equal exchange and assume that control and responsibility will also be equitable. Do not be surprised by the tremendous amount to be learned from your new partner.

5) Funding

Make a little go a long way. You do not have to be rich to be effective. A monthly commitment of \$20 can help to make significant improvements in the quality of end-of-life care in a developing country.

6) Assistance

Provide assistance on a manageable scale. Many project participants feel overwhelmed by the magnitude of needs in developing countries. By pooling resources and talents you can start small and work your way up to bigger things.

7) Communication

Connect with others. Twinning is about developing friendships with like-minded people around the globe. Your participation can make a real difference in someone’s life. On-site visits can also bring insights into the ways care is delivered in resource poor areas. This not only increases your sense of the value of your partnership but brings renewed appreciation for the richness of your home environment.

A Personal Perspective

For an enlightening personal take on guiding principles for successful twinning, see the comments of Dr. David Falk of the *Hold Me Africa* hospice palliative care twinning project (Appendix A).

4. TWINNING PROGRESS FLOW CHART



1. GETTING STARTED

Sharing Your Vision

It only takes one enthusiastic person with an idea to get a twinning project started. Talk to people in all areas of your organization. Your commitment will inspire others. Before long, word will spread and you will have an enthusiastic team.

Be sure to make use of group talents and community connections. Collect e-mail addresses and phone numbers from people who show interest. Remember: you do not need large groups; you just need people who share your twinning vision.

Planting the Seed... Use Your Imagination!

Here are some ideas for generating interest in your twinning project:

- create a slide show;
- organize a culturally-themed potluck lunch or supper;
- invite a guest from an existing twinning project to present at your annual general meeting; or
- introduce twinning at your organization's "visioning day".

DEVELOPING A VISION STATEMENT

Your vision statement should be inspiring and energizing. It should open people's eyes to the vast potential of your project, painting a mental picture that will motivate them to participate. Summarize your vision using a powerful phrase in the first sentence. Write your statement in the active voice as if you were reporting what you actually see, hear, think and feel after your ideal outcome is realized. You can combine your Vision Statement with a values statement that reflects your organization's project priorities.

Define who you are, what you have to offer, and what you would like to gain. Take a flexible approach: the details will likely change as your project develops.

Sample Vision Statements

Examples of vision statements from three Canadian twinning projects

"We hope to develop a reciprocal "Friendship Agreement" with a hospice in Nepal, to share friendship, encouragement and resources, and to learn from each other's experiences and cultures."

- *Nanaimo Project Team*

"We have joined together to explore opportunities to create awareness, community and financial support for hospice work and education in Africa and here, in our own city, at Agapé Hospice."

- *Calgary Project Team*

"To achieve quality end-of-life care for all through shared resources, knowledge and expertise."

- *Victoria Twinning Team*

2. BUILDING SUPPORT AND PARTICIPATION TAPPING INTO PEOPLE POWER

Recruiting Volunteers

People around you will have heard about the project and will want to get involved as project volunteers. Ask them to fill out a *Volunteer Application Form* (see Appendix B). Keep track of specific skills that volunteers are willing to provide and file volunteer reference and contact information in one place.

It is important to identify and assign specific jobs to project volunteers so that they feel they are contributing in a meaningful way. Once expectations and roles are clarified, you may wish to ask your project volunteers to begin networking with people in the community who might be in a position to offer resources or services.

Twining Tip #1: Expand Project “Ownership”

Once you have established a core group of volunteers to do the bulk of the early work, you must reach out to the broader hospice palliative care community. Their buy-in and support for the project will be essential to your long-term success.

REACHING OUT TO THE HOSPICE PALLIATIVE CARE COMMUNITY

Make a list of your hospice palliative care networks. Contact other community members, including hospice staff and volunteers, community response teams, home care nurses, hospital staff and palliative care physicians, board members and agency leaders.

Establish a contact person within each of these groups and keep them up to date on your activities. Keep in mind that these people are busy. If they are going to get involved they will want to have a meaningful role. As with your project volunteers, be sure you have specific jobs for your hospice volunteers, otherwise you may lose their interest. Look specifically for those who can provide expertise in leadership, supervision, financial accountability, communications and outreach.

**Twining Tip #2:
Benefit from International Project
Experience**

Your project will benefit from those with expertise in both hospice palliative care and international development. Look to the broader hospice palliative care community as a resource for project leadership. You may discover that there are people experienced in international work who will contribute to your project.

Make a point of being welcoming and inclusive. Everyone has something valuable to offer. At your first meeting, review the background material included in the Introduction and Principles of Successful Twining section of this guide. Invite each person to talk about what motivated them to come to the meeting, and then plan your next steps. Sometimes the idea and the plan may be great, but the timing may not be right. You may have to accept this and wait. Be patient.

GETTING ASSISTANCE FROM YOUR ORGANIZATION

Although your project is volunteer-driven, you may still need staff input and supervision on administrative, logistical and financial matters. Ask your organization what it is willing to provide to your project.

Speak with your hospice palliative care community leaders on an informal basis. Seek advice and direction from people such as your Executive Director or senior officials of your hospice, the Medical Director of your palliative care unit, managers of volunteers, nurses, counsellors and spiritual care workers, and your Director of Home Care Nursing.

**Twining Tip #3:
Be Realistic in Your Expectations**

“We had the commitment from Agapé Hospice for supplies, meeting rooms, coffee/tea and the expertise and experience of a hospice program that was 14 years old. All of the work that Hold Me Africa has been doing is on a volunteer basis. Due to the constraints of fundraising we wanted the money raised to go into programs and education. This did lead to some delays in processes and communication as everyone is busy, busy, and busy.”

Peta, Calgary/Litein Twining Project

3. TAKING CARE OF BUSINESS

Reviewing basic legal issues

Once you have obtained support for the idea of twinning, you can review some basic legal issues that may affect your organization. Take a look at your provincial Societies Act and your organization's constitution and by-laws. The project will need to be in line with your organization's constitutional mandate. If an amendment to your constitution is needed to allow for international work, you may need to wait until your annual general meeting. Be sure to provide information well in advance of the meeting so that your board members can make an informed decision.

MAKE A PRELIMINARY PRESENTATION TO THE BOARD

At this point you have not made a commitment to a specific partner but you may have a number of potential partners in mind. Keep your options open until you have established your priorities, written your Project Plan (see page 15) and visited prospective project sites.

Even without a specific contract you will want to get agreement from your governing board to gather resources and work out the specifics. You can assure your board members that you have sufficient guidance and support by showing them this *'How -To' Guide to Hospice Palliative Care Twinning Projects*.

Expect and welcome questions and concerns from the board; it's their job to act as a watchdog and to set the direction for your organization. Use their input as fuel for further "due diligence". Once you secure the board's agreement in principle, be clear that you will come back with more details before seeking final project approval.

CHOOSE A STEERING COMMITTEE

The purpose of the Steering Committee is to take responsibility for making decisions for the project "as a whole". Include leaders, such as a board member or your executive director, on your Steering Committee.

In the early stages you may need to meet as often as once a week. Each member will contribute time between meetings.

If your group members are from different agencies you may find it difficult to meet in person and decide to do business by phone or e-mail. Once the project is in place, meetings can become more infrequent.

SUSTAINABILITY

Sustainability is an important theme in twinning. Consider what will happen when the person who is the "driving force" behind your Steering Committee steps down. You will need to identify a plan for the future that is not dependent on one person. Electing a Steering Committee Co-Chair is one option.

PROJECT STEERING COMMITTEE : **KEY PLAYERS**

The Project Manager...

ensures that the project is completed on time and within budget, as outlined in your project agreements.



The Chair...

books group meetings, sets the agenda, keeps the meeting focused, facilitates discussion and ensures that discussion leads to a conclusion or resolution.



The Secretary...

records the minutes of the meetings and sends them to the Chair. The Secretary is in charge of any part of the project that requires written communication.



The Fundraiser...

is in charge of managing fundraising projects.



The Accountant...

manages the project's bank account, receives and sends money and materials, keeps detailed, accurate records and has signing authority on project cheques.



Group Members...

participate at meetings, volunteer for and complete assigned tasks, and may supervise volunteers or serve on subcommittees.

4. MAKING A PROJECT PLAN

A step-by-step Project Plan is essential to the success of your twinning initiative. The Project Plan helps you to work together as a team by thinking and talking about who does what and when. It also demonstrates to your supporters that you have thought through the details.

STEP #1 : DEFINE YOUR PURPOSE

- 1) What is your project designed to accomplish?
- 2) How does this project reflect your Vision Statement?
- 3) How will this project bring mutual benefits to you and your twin organization?
- 4) What do you and your twin have to offer?

STEP # 2 : IDENTIFY YOUR GOALS

Your statement of objectives should be clear, specific, measurable and attainable. It should include activities that your organization will carry out, financial commitments / investments, and organizational time commitments.

Twinning Tip # 4 : Be Flexible In Your Planning Approach

“What started out to be a discussion about a hospice palliative care program ended up becoming a hospital palliative care program. That shift continues to define itself, its needs and our relationship accordingly.”

Peta, Calgary/Litein Twinning Project.

STEP # 3 : DEFINE YOUR SCOPE

Define your project scope in terms of your activities. Decide what is to be included and excluded. Remember that you are still talking about the project as a whole and not about the specifics. Your scope should reflect your project goals, define the actions you will undertake to meet these goals, and establish limits in terms of work to be undertaken.

STEP # 4 : IDENTIFY PROJECT BENEFITS

Make a list of ways in which the project will benefit your organization, including what you hope to learn and how it will impact on your understanding of and approach to the practice of palliative care.

STEP #5 : ESTABLISH CRITERIA FOR CHOOSING A TWIN

It is important to establish social, cultural, linguistic and operational criteria for choosing your twinning partner. Consider language. Is English / French a commonly spoken language within your twin organization? Think about the language strengths in your organization. Also, when you consider cross-cultural communication, it's important to be mindful of local context.

Be sure to evaluate the size and type of service level you want to establish between your two organizations, as well as commonalities between your respective goals and visions. This will help you keep your project focused.

**STEP #6 :
IDENTIFY STAKEHOLDERS**

Specify people or groups who have a stake in the outcome of the project. They should include your organization's staff, board members, volunteers and community partners, and others as your project grows in size.

**STEP #7 :
IDENTIFY PROJECT CONSTRAINTS**

Constraints are uncontrollable elements that impact your project. They are not necessarily problems; however, you should be aware of them because they represent potential limitations on your project. Two of the most prevalent constraints are time and monetary resources.

**STEP #8 :
IDENTIFY MAJOR DELIVERABLES**

Make a list of tangible deliverables (actions / products) that will satisfy the scope of the project.

**STEP #9 :
OUTLINE MILESTONES**

Milestones mark the dates on which deliverables are to be completed. Be sure to include dates when the project requires further authorization. Milestones are critical to ensuring that tasks are completed on schedule and are in line with commitments or agreements. Remember: some flexibility is required when setting milestones as you'll often face changing circumstances. (Experienced twinning participants identify communication breakdown, political unrest, extreme weather or change of personnel as typical causes of project delays).

**STEP # 10 :
DEFINE A PROJECT MANAGEMENT BUDGET**

What are the costs of managing the project? Anticipated project management costs may include:

- staff working on the project on paid time;
- meeting space;
- supplies and the use of office equipment;
- travel to a twinning site;
- training in cultural awareness; and
- bank charges at home and in your partner's community.

If you have no budget for these items because you are counting solely on volunteer work and donated resources, you must clarify:

- which donations will support which team members;
- who can apply for international travel grants;
- who can travel as a team member; and
- what kinds of resources can be received by your team.

**STEP # 11 :
FUNDRAISING**

Describe your projected fundraising efforts, including the targeting of new donors and the planning of fundraising events. You should also be clear about who will supervise fundraising volunteers and what other foundations or organizations may be contributing to your project.

**STEP #12 :
DEFINE PROJECT ROLES AND RESPONSIBILITIES**

Define the general roles and responsibilities of those who will be involved in the project, including the project sponsor, Steering Committee Chair and members, the team leader, fundraisers and project volunteers.

**STEP #13 :
COMMUNICATIONS PLANNING**

You must be vigilant about letting the right people know what is happening at the right time. Decide who will take responsibility for items such as e-mails to team members, reports to management and the board, updates to community partners, communications within your twin organization, and donor appreciation. You must also designate someone to deal with the media.

**STEP # 14 :
ANTICIPATE RISKS INVOLVED**

A degree of risk accompanies all projects. Risk identification must therefore be conducted by project managers, members of the project team and stakeholders.

When identifying potential risks, be sure to rate their likelihood of occurring, and identify what you would do to address them.

How to Assess Your Project Readiness

Now that you have made a detailed Project Plan, you can assess your organization's readiness to enter into a twinning relationship by answering the following questions:

- Do you have stable leadership and funding?
- Do individuals have time to devote to this project?
- What does your organization have to offer and what does it hope to gain?
- What evidence is there to support your ability to be successful?
- Is your organization willing and able, within its constitution, to twin with an international partner?
- List three influential people, with their contact numbers, who are willing to commit to this project.

If you answered each of these questions satisfactorily, you are ready to move on to your search for a Twinning Project Partner.

5. PHASE 1 CHECKLIST

1. Develop a Vision Statement
 2. Recruit Volunteers
 3. Seek out Expertise
 4. Match Volunteer Jobs to Skills
 5. Get Support From Your Organization
 6. Review Legal Issues
 7. Make a Presentation to Your Board of Directors
 8. Choose a Steering Committee
 9. Make a Project Plan
 10. Assess Your Project Readiness
-

1. FINDING A TWINNING PARTNER

The most obvious place to look for a twinning partner is through a pre-existing connection with an individual or organization involved in hospice palliative care twinning. If you have no such connection, you may wish to contact the following sources...

- **The Hospice Information Bulletin** is an international electronic newsletter published every two months. You can advertise for a “Hospice Twin” at <http://www.helpthehospices.org.uk>
- **The International Network for Cancer Treatment and Research (INCTR)** is involved in groundwork, education, and development of training centres for palliative care in developing countries. The INCTR’s relationships with new programs could provide a great foundation for a twinning project. <http://www.inctr.org>
- **The International Association for Hospice and Palliative Care (IAHPC)** has a twinning and hosting application form. http://www.hospicecare.com/forms/twin_form.htm
- **The Foundation for Hospice in Sub-Saharan Africa** has an application for partnership form and a toolkit to help organizations get started. <http://www.fhssa.org/i4a/pages/Indexcfm?pageid=3296>

PREPARE A LETTER OF INTEREST

Select potential twin organizations and prepare a *Letter of Interest* (see Appendix C) to let them know that you are interested in a twinning partnership. In your *Letter of Interest* you should outline your organization’s history and services, as well as its proposed twinning mission, vision and goals.

Since this is also an opportunity for your prospective twins to consider the merits of your organization, you may wish to send each of them a copy of your *Readiness Assessment* (See page 14) along with your *Letter of Interest*.

It is important at this stage to refrain from making any firm commitments. Determine what the next steps should be if both parties are interested.

MAKE A PRELIMINARY VISIT

Communication by letter, e-mail, or telephone can get the ball rolling but there is nothing like a personal meeting to establish familiarity, confidence and trust. An initial visit to the site allows you to meet key personnel, compare goals, assess the situation, and discover the “spirit” of your prospective twinning partner. It is important that you and your prospective partner agree beforehand what each of you would like to gain from your site visit.

FIND THE BEST FIT

It is only natural to have big dreams for your project, but you should temper your expectations with practical thinking about the challenges you will encounter on the ground and how you will deal with them.

MAKING YOUR DECISION

It is important that your group reach consensus on your choice of twin. Discuss the options until agreement is reached. Once you have made your choice, contact your prospective twin to let them know that you are ready to enter into a twinning partnership. If you choose not to twin with a particular organization, you may wish to inform the organization of your decision and the rationale behind it in a sensitive and respectful way.

BALANCE INTERESTS, CONCERNS AND EXPECTATIONS

All of those committed to the project will have their own interests, concerns and expectations. Be prepared for differences in perspectives, both within your group and between organizations. There will likely be differences in opinion with respect to project definition, individual responsibilities, priorities for action, and how project control is shared. In order to avoid competing personal agendas, ensure that spokespersons for both twinning partners impartially represent the interests of their entire organizations.

FOCUS ON PARTNER NEEDS

Your twinning partner is the expert on its own situation. Carefully consider your partner's concerns and its system for addressing palliative care needs. Make sure you fully understand your partner's perspective before offering suggestions for improving hospice palliative care.

Twinning Tip # 5 : Responding to Urgent Needs

As a general guideline, you should accept your twin's evaluation of the most urgent hospice palliative care needs. Give your twin's solution priority and be honest and realistic about what you can offer by way of assistance.

2. DEFINING YOUR PARTNERSHIP

A *Friendship Agreement* (see Appendix D) defines the spirit of your partnership and formalizes your relationship. It is co-written and signed by representatives of both organizations and includes project goals and methods, which should be reviewed annually by both partners to see if adjustments are required.

REQUEST A NEEDS ASSESSMENT FROM YOUR TWIN

Your twin should perform a *Needs Assessment* (see Appendix E) to determine which services, materials and resources are already in place for parents and families, and which need to be provided in order to enhance hospice palliative care in the community. This assessment should include: an overview of current infrastructure, skills, knowledge and training; educational materials, supplies and equipment; and community support, networking and partnerships.

By examining your twin's current situation you will find their strengths and discover services already provided. Ask your twin what its program would look like if it could acquire resources needed to address a broader range of palliative care needs.

The Rewards of Being a Flexible Partner

“We began with the idea that we would send money for medicine and comfort items for patients. What was requested was money to hire two palliative care nurses and a ward aide to establish a separate palliative care unit at Bhaktapur hospital. Unsure, at first, about how to respond, we went along with their request, ‘if that’s what they need, then that’s what we’ll send’. What is becoming clear to us, over time, is that both compassion-oriented needs and program needs are valid and worthy of our support. With the development of the palliative care unit at Bhaktapur Cancer Hospital there comes the possibility of establishing a center of excellence for palliative care in Nepal. This opens the possibility of training others to carry on palliative care work in other regions.”

*Dierdre, Nanaimo/Bhaktapur
Twinning Project*

SETTING PROJECT GOALS

Project goals are determined by the difference between what is in place and what is needed. Be sure to create a list of steps to meet specific goals, and then define who will take responsibility for each step. Compare these goals with the goals laid out in your Project Plan.

In defining your project goals you should establish a balance between immediate needs (such as treatments that contribute directly to patient comfort) and long-term needs (such as dedicated infrastructure to house patients). There is no “correct” balance. Your ultimate goals will depend on your collective capacities and priorities.

OBTAIN BOARD APPROVAL

Provide each member of your board of directors with a copy of your Project Plan well in advance of your project approval meeting. Your presentation could be accompanied by a slide show or other visuals that demonstrate real people with genuine needs. Be patient if you meet with skepticism; the board is simply doing its job when it asks tough questions and demands satisfactory answers.

While the board’s questions will be addressed in your Project Plan, you should be prepared to respond to queries on specific details and eventualities. Questions from the board are a great opportunity to uncover areas where you need to do further planning.

Presenting To Your Board : Be Prepared for Tough Questions

- How much will the project cost?
- What is to be gained?
- How much staff time will it take?
- Is the project within the organization’s mandate and constitution?
- What does the Canada Customs and Revenue Agency say about international partnerships?
- Is this the best use of our resources?

3. SIGNING AN AGENCY AGREEMENT

Support from your board, together with your written *Friendship Agreement*, is the springboard for your *Agency Agreement* (See Appendix F).

An *Agency Agreement* is a legal requirement if you are a registered non-profit society incorporated under the *Society's Act*. The *Agency Agreement* covers financial and service goals, explains why these goals are attainable, and presents a plan for reaching them. By completing the *Agency Agreement* you ensure that donations to your project are tax deductible.

Income Tax Implications - Did You Know?

Under the *Income Tax Act*, a registered charity can carry on its charitable activities, both inside and outside Canada, in one of two ways: it can make gifts to other organizations that are qualified donors, or it can carry on its own charitable activities through intermediaries (i.e. employees, missionaries, agent or contractor).

When undertaking charitable activities outside Canada, a registered charity must establish a formal agreement with the intermediary and must demonstrate that it retains direction and control over the use of its resources.

For details, see the Canada Customs and Revenue Agency's publication entitled *Registered Charities: Operating Outside Canada* at <http://www.cra-arc.gc.ca/E/pub/tg/rc4106/README.html>

4. ACTING WITH SUSTAINABILITY IN MIND

Project sustainability demands that you be realistic about budget allocations. It is better to provide a modest sum that is reliable than to aim too high and not follow through. Plan a safety net right from the beginning. Make sure that you have three months of payments in the bank before you begin in order to avoid gaps in regular funding.

Under the terms of the *Agency Agreement*, you and your twin must determine how money will be spent. Your budget should address all possible expenses, including the costs of handling the funds (i.e., currency conversion, bank transfer and administrative fees).

ALLOW FOR ADDITIONAL COSTS

Be sure to allow for additional project costs, which may include: on-site contractors to set up communication systems; communications equipment such as computers, telephones, or cameras; shipping; travel for on-site visits; the costs of meetings (including room rentals, refreshments, and travel costs for presentations); and potential honorariums for people who have made outstanding contributions.

When you have reached consensus on your *Agency Agreement*, ensure that authorized representatives sign the agreement and that copies are retained by each partner.

DIVISION OF FUNDS

A general rule of thumb for most projects is that 80 percent of funding goes directly to support operations within the twin organization. The remaining 20 percent, if required, will be allocated to administrative and communication support. Financial agreements should be developed jointly with the twin organization and signed by authorized persons. Any deviation from the agreement must be made in writing and agreed to by both parties.

5. PHASE 2 CHECKLIST

1. Contact Twinning Resources
 2. Prepare a Letter of Interest
 3. Make a Preliminary Site Visit(s)
 4. Choose Your Partner
 5. Sign a *Friendship Agreement*
 6. Request a *Needs Assessment* from your Twin
 7. Examine Income Tax Implications of Your Project
 8. Set Project Goals
 9. Obtain Board Approval
 10. Sign an *Agency Agreement*
-

1. FINANCIAL MANAGEMENT AND ACCOUNTABILITY

Managing Donations

When you wrote your *Agency Agreement*, you and your twin agreed on how donations would be spent. You outlined a budget and how to be accountable. At the implementation stage you must now clarify the accountability requirements of both organizations with a view to determining who will manage donations, what kind of record keeping is acceptable, how money will be sent and received, and who will make sure that funds are spent as designated.

A twinning project must balance faith and goodwill with realism. Mismanagement and diversion of funds are potential concerns. While effective, trusting relationships will evolve during the course of the project, both partners must agree at the outset that everyone handling project money will be accountable.

One of your first project priorities is to appoint a person or group to handle your project's finances. The group, which may form the core of your Fundraising Committee, will be required to establish a project account and billing number. As the project gets underway, this group will be responsible for receiving donations in the form of cash, post-dated cheque or credit card, managing and accounting for deposits and withdrawals, and setting up a system for issuing tax refundable receipts to donors.

Fundraising communication within your own organization can be done through an e-mail distribution list. Donors should receive biannual updates informing them of how their donations are being spent.

Twinning Tip #6: Keep a Paper Trail

Clear lines of responsibility, transparency, regular reporting, accurate records, and site visits will assure donors that you are doing everything possible to direct funds where they are intended to go.

TRANSFERRING MONEY TO YOUR TWIN

It is a good idea to send funding installments to your twin four times a year rather than every month. This will cut down on banking fees and administrative time for both you and your project partner.

Twinning Tip #7 :
Ins and Outs of Money Transfers

- As U.S. dollars (USD) are the closest thing to international currency, your Canadian funds have to be converted to USD before they are sent overseas.
- You do not need to use a USD bank account, but there will be an exchange rate at the time of transfer.
- Do not send funds by mail, as mail theft is common.
- International bank transfer of funds is the most reliable method, but banking fees are considerable. You can ask your bank if it is willing to waive transfer fees.

For small projects, the most efficient way to transfer funds is to open a bank account and give your partner a bank card for money withdrawal in the project country. This method is inexpensive and easy.

MANAGING HOSPICE STAFF DONATIONS

The best way to ensure a consistent stream of funding is to ask hospice staff donors to commit to automatic withdrawals from their pay twice a month. Remember: a little goes a long way. Even \$10.00 from each pay cheque can make a big difference. This method of fundraising will form the backbone of your project.

MANAGING OTHER DONATIONS

Monthly donations from the community also provide reliable, ongoing support. First, determine how many donors it will take to meet your monthly financial goal, then distribute a *Twinning Project Pledge Form* (See Appendix G) to your donors. You should also create opportunities for people to make “one-time” or annual donations.

2. FUNDRAISING

The Project Steering Committee must decide what kind of fundraising is acceptable. A Steering Committee member should therefore be assigned to the Fundraising Committee, ideally as Committee Chair.

COMMUNICATING YOUR FUNDRAISING NEEDS

You will likely have lots of people volunteering goods and services. Effective coordination of these resources is crucial to project success. Communication and coordination go hand in hand. Keep everyone in the loop. Make a habit of consulting regularly with your communications or public relations officer, fundraising officer, board members, executive director and volunteer manager.

FUNDRAISING SPECIAL EVENTS : EXPLORE YOUR OPTIONS

One-time events are a great way to raise money for your project. Examples include: a launch party with dinner music and a slide show; an auction of souvenirs collected during your initial site visit; or an audio-visual night at which you show pictures and tell stories about people who are contributing to your project.

You should also connect with your friends and business networks. Look for established businesses that might be willing to contribute to your special event.

Making Your Pitch : Be Creative!

“We did a slide presentation and “pitched” the idea of the hospice palliative care community becoming involved in the project. We laid out the initial idea of how we would provide funds to Bhaktapur to pay salaries for staff. We emphasized that we wanted to start small. We had pledge sheets available and were clear in asking for a commitment. Ethnic food was served along with wine and other beverages. The Palliative Care Unit and Hospice people were all there. That evening generated enough money to get started. Since then the Home Care Nursing/ Support people have been included.”

*Wendy, Nanaimo/Bhaktapur
Twinning Project*

3. PLANNING VISITS AND EXCHANGES

Pre-visit Preparation

At the heart of twinning is meeting people and building credibility, friendship and trust. For this reason, yearly visits or exchanges should be part of your annual planning process.

Explore resource and material needs as thoroughly as possible before your site visit. Also, when deciding who to send on your visit, consider what professional service needs your hosts would like to see addressed. If your host wants training or education for nurses, send a nurse. If your host wants help with administration, send an administrator.

Prior to your arrival, agree with your host partner on the number of people who will visit. You should also be very sensitive to the rights of patients and families. For this reason, you should discuss with your partner beforehand what kind of direct contact with patients and families will be permitted.

4. KEEPING COMMUNICATION AT THE FOREFRONT

Consider Intercultural Communication Training

Pre-visit intercultural communication training will ease the transition to your host community by helping you to explore the significance of intercultural power dynamics. Look for training in your town or city that covers areas such as culture, race, ethnicity, stereotypes, generalizations, values, expectations and assumptions.

Twining Tip #8 : Check Out Online Intercultural Resources

“We hired an instructor from the University of British Columbia’s Centre for Intercultural Communication. They also provide on-line courses and an excellent week-end workshop” (<http://cic.cstudies.ubc.ca>)

Wendy, Nanaimo/Bhaktapur Twining Project

CONNECTING ON A PERSONAL LEVEL

If you want to connect on a personal level, you must do some advance preparation. Find out ahead of time what small gifts would be appreciated. Bring photos of your family and your place of work. Connecting mother to mother, social worker to social worker, and person to person helps bridge cultural gaps and language barriers.

Understanding Your Hosts

A visit to your twinning partner’s community will provide a clear idea of the context in which your twin is operating. It is important to assess how to enter into that community. Let your twinning partner be your guide. Here are some factors to consider when visiting:

- Be aware that time, energy and funds are scarce. Hospitality is greatly valued in many cultures. Your hosts may overspend their limited time and money on you.
- Consider that hierarchy and gender roles in your host community may differ substantially from those you are accustomed to at home.
- Take the time to talk to your local project contact person about how your team is doing. Ask direct questions about cultural differences and ask if there is anything that you should know. Request politely and respectfully that your contact person explain practices and behaviours that you and your teammates do not understand.

BE AWARE OF YOUR IMPACT

Your visit will affect individuals and organizations across the entire host community. You should therefore consult regularly with your twin to gain a good understanding of this impact and what you can do to accentuate the positive and minimize any unintended negative consequences of your visit.

Make Use of Culture Coaches

“Hold Me Africa had the benefit of a volunteer who had lived in Litein and knew the community, hospital, and culture. He personally coached our team. Cultural assumptions are so easy to make. It’s really hard to take in the implications of a completely different culture. On the other hand, the philosophy of hospice palliative care has a common ground that surpasses differences and bonds people together.”

Peta, Calgary/Litein Project

FOCUS ON RESPECT AND MUTUAL UNDERSTANDING

The first priority of your visit is to learn about your twin’s world. Find out everything you can about your twin’s operation. Focus on respect and mutual understanding. Be aware of any urge to teach a “better” way. Maintaining an attitude of curiosity and openness will help you to build friendships.

Twinning Tip #9 : Understanding Different Approaches

“Our physician will be corresponding with their physician. Our administrator with theirs. There are also cultural “divides” that necessitated this. Doctors only want to correspond with doctors. The Head Matron would only correspond with someone she felt was ‘at her level’. There are very clear hierarchy issues that don’t exist here.”

Wendy, Nanaimo/ Bhaktapur.

ADJUSTING TO YOUR NEW SURROUNDINGS

Even when you are well prepared, the impact of arriving in a new country and meeting new people can be overwhelming. You may find that it takes a while to adjust to these environmental changes.

Allow two or three days to adapt to the time zone, culture, climate, and new medications, if applicable. Fatigue alone can make it hard to adjust. Recognize that you need time to familiarize yourself with the community and its culture. Be flexible and patient. Listening is the most important part of your visit.

ADDRESSING TEAM CHALLENGES

You may find the sudden intimacy of traveling and living with colleagues to be a little uncomfortable. It is normal for travelers to want some time and space to themselves. Attend to your own needs by allowing for time alone, recording your thoughts and feelings in a journal, and allowing for retreat into books or music.

Your traveling team should debrief once a day. Keep discussion open and honest. Ask your team members how things are going, if they need anything from you, or if you could be doing anything to help make their experience better. Be sure to communicate your own needs.

BEWARE OF MISSION DRIFT

The people you meet will touch your hearts and you may be struck by the unfairness of their situation. In the face of overwhelming need, it will be tempting to offer help above and beyond the prescribed project guidelines. While this experience is common, seasoned twinning volunteers will tell you that even the most determined people are usually unable to follow through on promises once they get home. Taking on additional responsibilities may also detract from the project's main goals. That is why it is a good idea to keep commitments within the formal context of the visit, respecting official lines of communication and authority.

Twinning Tip #10 : Be Patient with Yourself and Others

Fatigue and stress from being in a new environment may affect how well you get along with your traveling companions. Everyone has habits that help them feel comfortable and relaxed. Your usual methods of coping may simply not work as well in different surroundings. For this reason, you should go easy on yourself and on your teammates.

Twinning Tip #11: Stay Focused On Your Mission

“Keep focus on your mission. It is easy to lose sight of your original purpose. You may feel overwhelmed by the needs and be tempted to get sidetracked or spread too thin. Our focus shifted partway through the project when one of the volunteers made the decision to ‘volunteer’ for three years with our twin. That was not an expectation or part of the original plan.”

Peta, Calgary/Litein Twinning Project

ASK YOUR TWIN FOR FEEDBACK

If annual visits are part of your project plan, you can achieve maximum benefit from these visits by asking for and giving honest feedback. Remember that the potential for miscommunication and misunderstanding is normal in all human relationships. By inviting discussion, you can address small problems before they develop into bigger ones.

Contact the project leader within your twin organization and ask him or her to send an evaluation or communicate directly with you via phone or e-mail. Once you have received your twin's feedback, ask your twin to make recommendations for your next visit. Carefully consider your twin's feedback and recommendations before making your own recommendations for the next visiting project team.

POST-TRIP DEBRIEFING

Debrief team members as soon as you get home. Discuss the highlights of the trip and bring up any issues of contention or concern among team members (i.e., adequate preparation, support, satisfactory level of participation, sense of project ownership or accomplishment). Only after this debriefing should you make collaborative decisions on what follow-up action should be taken.

WRITE A TRIP REPORT

A written trip report should describe trip success and barriers, benefits for the two organizations, lessons learned, and recommendations for resolving outstanding issues. Make sure your trip report captures the human side of your visit. You can convey the spirit and grace of the people you visited through stories and photos that paint a vivid portrait of project reality for stakeholders back home.

Your supporters will appreciate your work and they will feel more connected to the project. This connection is what keeps the project alive and exciting for all!

RECIPROCATING THE VISIT

If you decide to host a group from your twin organization, agree on learning goals for the trip and determine what your visitors will be doing with their time. Answer your twin's questions about your culture and develop a hosting plan that responds to your visiting group's needs and interests.

Once your twinning visitors have arrived in Canada, give them an opportunity to rest and adjust to their new environment. Show them highlights of the area in which you live and open conversations about cultural issues. Help them to connect personally.

You may find that there is a different cultural expectation of the roles of "guest" and "host" among your visiting partners. In more individualistic cultures there may be an expectation that guests would like time to explore by themselves. In socially oriented cultures a guest may expect to be accompanied for the entire visit. Be sure to clarify your twinning visitors' preferences.

STAYING IN TOUCH WITH YOUR TWINNING PARTNER

Keeping in regular contact with your twinning partner can be a challenge. Consider your partner's access to technology (computer e-mail, fax, and phone). You may wish to use project start-up funds to buy communication products and services. If technology permits, consider using free voice and video internet services for inter-professional consultation.

ATTEND TO YOUR PUBLIC IMAGE

A good public image is vital to your project. You should therefore convey your communication priorities very clearly to the people within your organization who are charged with promotion, publicity, fundraising and volunteer management. Listen to what these people have to say about your project priorities and agree on a strategy for implementing them.

Consider All Sources of Communication Funding

“When we were doing the initial planning we had to consider how efficient communication was going to be. We asked a local law office (friends of the hospice and connected through one of the nurses on the palliative care unit) to consider funding this part of the project. They donated \$1,200 to cover the costs of a computer and a digital camera.”

Wendy, Nanaimo/Bhaktapur twinning Project

5. PHASE 3 CHECKLIST

1. Address Financial Accountability
 2. Assign a Group to Manage Finances
 3. Familiarize Yourself With Banking Rules/Regulations
 4. Distribute Pledge Forms to Donors
 5. Organize Fundraising Events
 6. Pre-visit Preparation (Focus on Partner Needs, Expectations)
 7. The Visit (Be Patient; Stay Focused on Project Goals)
 8. Request Twin Feedback
 9. Conduct Post-trip Debrief
 10. Write Trip Report
-

1. PROGRESS REVIEW

The first step in the Completion Phase of your twinning project is to undertake a *Progress Review* (see Appendix H), which satisfies your commitment to transparency and accountability and enables you to record each project milestone.

The *Progress Review* also helps you update your plan of action for going forward. Make sure this revised plan of action is in line with the original agreements made with your board and donors and that it complies with your provincial *Societies Act* and Canada Customs and Revenue Agency guidelines. Your revised plan of action should be clearly outlined in writing and agreed to by both project partners.

2. PROJECT REPORT

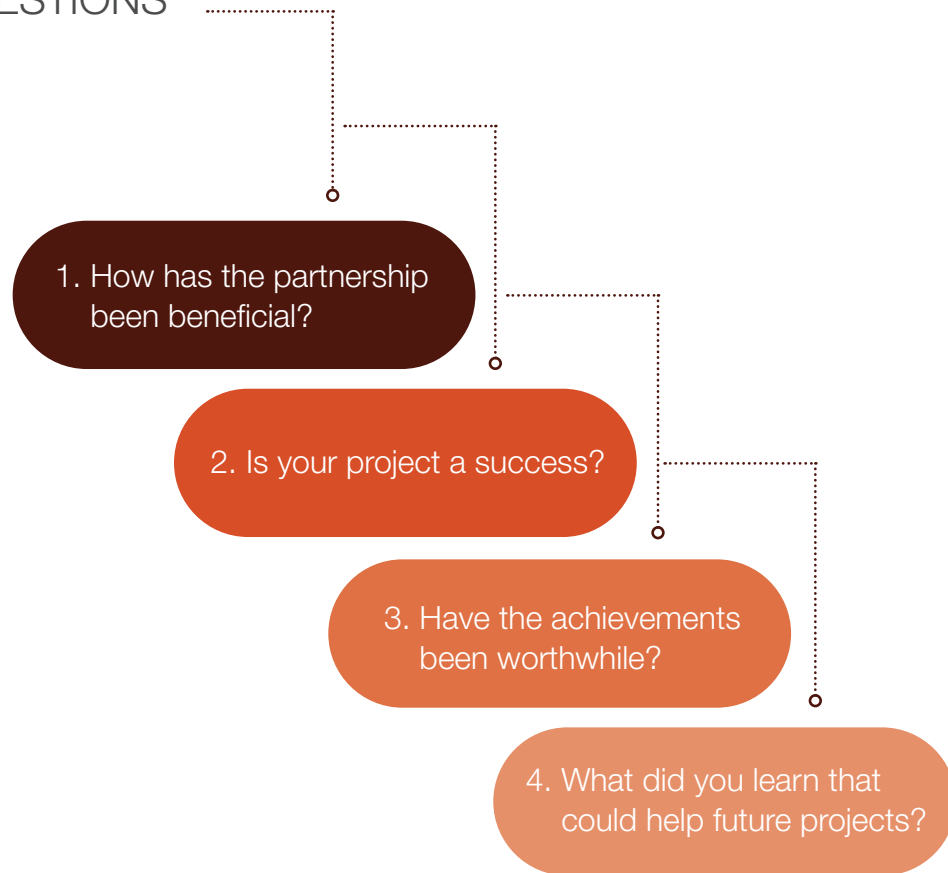
The second step in your Completion Phase is to prepare a Project Report summarizing project objectives, actions, changes, impacts, fundraising and spending.

3. PROJECT AND PARTNERSHIP EVALUATION

Once you have completed your Project Report, you are ready to do your Project and Partnership Evaluation (see Appendix I). The following section outlines key questions posed in this evaluation.

PROJECT AND PARTNERSHIP EVALUATION

KEY QUESTIONS



3.1. HOW HAS THE PARTNERSHIP BEEN BENEFICIAL?

Refer to your Progress Review and the Project Report for information on this question. You will want to interview the project team, staff and board members from each twinning partner to assess personal, professional and organizational benefits.

Your twinning project should have resulted in personal or professional benefits (i.e., learning new skills, methods, or knowledge) in one or more of the following areas:

- care, treatment or support strategies;
- legal, ethical and human rights initiatives;
- a formal network that has been strengthened and developed;
- policy development and advocacy;
- strengthened communication, fundraising, and management skills;
- community-based research; and
- development of the board of directors.

Your twinning project should have resulted in one or more of the following organizational benefits:

- increased capacity building;
- identification of best hospice palliative care practices;
- increased program effectiveness;
- broadened horizons;
- enhanced relationship building;
- organizational solidarity and progress; and
- contribution to the global hospice palliative care movement.

3.2. IS YOUR PROJECT A SUCCESS?

To determine if your project is a success, you will need to revisit your *Friendship and Agency Agreements* (Appendices D and F), as well as your Progress Review and Project Report. Project participants should be interviewed to gather observations and evaluations.

Each partner should assess the project independently before comparing notes. It is important to know if both partners agree on whether or not the project was successful. If you both agree, do you agree for the same or different reasons? Is there consensus on which achievements, processes, structures or events were most effective in advancing project goals?

Determining Your Project's Success

Your partnership should be considered successful if:

- *both partners are satisfied with the interaction;*
- *mutually agreed upon goals were met;*
- *something of value was learned that can be applied in both locations;*
- *priority tasks were completed;*
- *all donated resources have been accounted for; and*
- *both parties are satisfied that twinning agreements have been fulfilled.*

3.3. HAVE THE ACHIEVEMENTS BEEN WORTHWHILE?

It is important that both partners reach consensus on whether or not the overall project achievements were worth the efforts expended. Review your project outcomes in light of each partner's mandate and activity areas. Refer to the *Friendship Agreement*. You may also want to interview staff and board members from each twinning partner. Evaluate whether your partnership has served the vision and goals of each partner as well as your partnership mission.

You must also determine whether there was enough support and enough resources to sustain the partnership and meet the Project Plan. Were both organizations fully engaged in the partnership? Did both partners feel they were seen as equals? Was input from both partners given equal weight?

3.4. WHAT DID YOU LEARN THAT COULD AFFECT FUTURE PROJECTS?

Look at your Progress Review and Project Report, as well as information from your Project and Partnership Evaluation, to assess what was learned. It is important to identify barriers and challenges, and find strategies that can be used to avoid mistakes in future partnership projects. You will also need to determine who might benefit from the personal, professional and organizational knowledge gained from the project. Think about how you might share lessons learned with other staff members, board members, and local and national community partners.

4. PLANNING FOR THE FUTURE

You must now decide whether the partnership will continue and, if so, in what way. Your options include: continuing with the present level of commitment, expanding your commitment, adding other partners to increase project effectiveness, or ending the relationship.

Building Long-term Capacity

You must consider how your twinning partner will manage when your specified project period has ended. It might be helpful to seek out local resources to help your twin build long-term capacity. Consider assisting your twin in linking with other local palliative care providers, exploring educational resources provided by national palliative care associations, and inviting local leaders, such as medical directors, to meet with you and your twin to talk about concerns and to attend planning meetings.

WRAP-UP

Make sure that all donations have been accounted for and that all fund transfers have been completed. Then sign off on bank accounts, internet accounts, and audit records and make sure there are no outstanding bills or charges.

Contact everyone on your list of major stakeholders and debrief them on the project. Follow up with a written thank you note acknowledging their support and participation. Any relationship issues between your team, your partner's team, or your organizations should be resolved. Acknowledgement and appreciation should always be formally expressed.

5. PHASE 4 CHECKLIST

1. Undertake Progress Review
 2. Prepare Project Report
 3. Complete Project and Partnership Evaluation
 4. Detail Project Benefits
 5. Detail Project Successes
 6. Have Achievements Been Worthwhile?
 7. Detail Personal, Professional and Organizational Benefits
 8. Make Your Partnership Decision
 9. Plan for the Future
 10. Wrap-up
-

CONCLUSION

A Practical Took Kit for Your Organization

This '*How -To*' *Guide to Hospice Palliative Care Twinning Projects* is intended to serve as a practical tool kit for your organization as you undertake and develop your hospice palliative care twinning project with a partner health care organization in a developing country.

The guide's four-phase approach to preparation, partnership, implementation and project completion offers step-by-step support to all those involved in your initiative from hospice palliative care professionals to project volunteers, supporters and stakeholders.

This practical approach is accompanied by a comprehensive overview of guiding principles for twinning which will assist you in developing and implementing a highly successful twinning project. These principles include: patience and flexibility, sensitivity and respect, sustainability, reciprocity, well-managed funding, appropriate assistance, and a commitment to effective communication.

It is hoped that the application of the guide's four-phase approach and guiding principles will help you and your partner organization in your collective efforts to enhance hospice palliative care delivery and make a real difference for individuals and families in your project community.

Good luck!

APPENDICES

- A) Twinning Project Guiding Principles - a Personal Perspective
 - B) Volunteer Application Form
 - C) Letter of Interest
 - D) Friendship Agreement
 - E) Needs Assessment
 - F) Agency Agreement
 - G) Pledge Form
 - H) Progress Review
 - I) Project and Partnership Evaluation
-

APPENDIX A

Twinning Project Guiding Principles - A Personal Perspective

Dr. David Falk, from *Hold Me Africa*, shares some guiding principles.

Dear Friends:

Remember that we come from a western perspective with more cultural assumptions than we think we have. This is a built-in bias. We have a need to be involved in “meaningful” things, but so often that need is OUR need, not our partners. Remember:

1) We are NOT the experts.

So often we want to share what we have learned but we do it with an attitude that we know the answers. Our partners have lived in their community for many years and know many answers of attitudes, processes, community, and values which we do not even start to comprehend. They are the experts in their community; therefore we come with OUR story to share and interface with THEIR story.

2) Our money can be a poison.

So often the first thing that comes to mind is what we do not have. Our partner is no different. When asked how we can help, a list of things they would like comes before you – a building, more drugs, a salary, a trip, a computer, etc. We can come with our money, but it can spoil their growth. I have found that a small amount of money used wisely promotes more growth than a larger amount of money. Do not venture into financial assistance without your partner contributing at least ½ of the costs, either in cash or in kind. Nor should you expect your partner to give everything without you giving your half.

3) Look behind the “want” list.

So often the real need is not in the first want list but in the reasons behind the “want” expressed. We have given laptop computers which have been of great assistance, but the real need is not so much the computer as the knowledge of how best to use the computer and what it can accomplish. The learning needed behind that computer is most valuable. Requests for vehicles are always present. The real need behind this request is usually improved transportation on roads which need repair, or money to use the existing public transportation, or the need to transport patients. Sometimes the “want” list item comes from what they perceive a hospice program looks like from TV but it is not based on knowledge of reality.

Our “want” list comes with the need to “help”. But help is so often defined as what I can give or do for you. Why do we “want” this? Examine your motives.

4) Watch your heart response.

If you are to visit your partner’s community, be aware that the needs you will see are astronomical and your heart will be torn. Let it be torn but do not bend to helping out of sympathy. This only promotes dependency and destroys mutual respect. Take much time to examine yourself to see that you do not act out of sympathy to ease your own conscience.

5) Empower people, not systems or things.

Your partner knows the processes and the resources that are available in the local area. They need to have eyes to see these resources so they can harness them to good use, not ask you to provide these resources for them. You do not need to be recognized because you have helped twin a hospice. The people we empower get that recognition, we get their friendship.

6) Always have sustainability before you.

This is not just sustainability from your perspective but what your partner can sustain. So often we worry that we will not be able to sustain our end of the partnership and so we lose sight of how well our partner is doing. Or we want to share all we have learned and experienced in our hospice program, and forget to check how well our partner is able to incorporate all this into their life, their program. Or we do not have time to hear their knowledge and their experiences. It is better to start small and slow than big and fast. It is better to learn from a small number of committed people who will stay for a number of years than to spread yourself to many.

7) Always start with the end in sight.

Remember that friendship has boundaries. When you make a commitment, establish a mutual timeline with a well-defined endpoint and stick to it.

8) Don't just build buildings, build people, and build friendships,

because these people will build a program or a community that will care for the dying. This is more important than spending resources on buildings alone, which can rob you of precious resources and time from the primary purpose – helping those who are dying.

APPENDIX B

Volunteer Application Form

Name: _____

Street Address: _____

E-mail: _____

Phone: _____

Emergency contact: _____

Relevant Skills: _____

Areas of interest:

- Fundraising
- Communication
- Finances
- Traveling

Character references:

Name and Contact Information: _____

Name and Contact Information: _____

- I agree to follow the guidelines of the steering committee when volunteering my time.
- I agree to focus my efforts on the goals and purposes of the twinning project.
- I agree to refrain from creating “side projects” while working on the twinning project.

Signature _____

APPENDIX C

Letter of Interest

(Name of your twin organization)

Dear:

(Name of your organization) is a palliative end-of-life care facility that has provided services to patients and families over the past *(write out number)* of years. Our vision is to *(write out your vision)*. Our mission is to *(write out your mission)*.

In keeping with our vision and mission statements our particular goal for this project is to *(Fill in your goal)*.

We would like to know if your organization would be interested in twinning with us.

We are willing to make an initial *(fill in the number)* year commitment to assist your organization in meeting palliative end-of-life care needs of patients and families and to support staff in the delivery of care. The assistance will depend upon what your identified needs are and our ability to meet them. Assistance could take the form of direct funding or the provision of practical materials. We could also provide clinical practitioners to visit your organization to help provide care in a direct way.

At the same time, we can learn much from your organization that can be used in our own organization, such as how to be present for patients and families from different cultures, and how to use alternative or complementary medicine that is not well known to us. *(Add other things that you would like to learn)*.

If you are interested in discussing the possibility of a twinning relationship, I would be very pleased to hear from you.

Sincerely,

Executive Director

(Insert the name of your organization)

APPENDIX D

Friendship Agreement

Between: _____
(The name of your organization)

And: _____
(The name of your twin's organization)

Our Goals: _____

Our Methods: _____

This agreement will be reviewed annually in order to assess our effectiveness as partners in hospice palliative care and to make any necessary changes to our goals and methods.

For:

Name and position Date

Name and position Date

For:

Name and position Date

Name and position Date

APPENDIX E

Needs Assessment

**The purpose of this form is to help us to understand your situation.
Please discuss the following:**

Who is facing end-of-life care? _____

What kind of resources (spiritual, social, mental, emotional, physical) do patients and families already have? _____

What kind of spiritual, social, mental, emotional, and physical challenges do patients and families face? _____

What community resources are already in place that might assist the dying and their families? _____

List what is needed. _____

From this list, what is the most important? _____

What kind of training would be needed to put this in place? _____

What kind of material resources would be needed to put this in place? _____

APPENDIX F

Agency Agreement

Your name: _____

Your twin's name: _____

Name of your Twinning Project: _____

Made in duplicate and to remain in effect for a period of *(insert number of years)* from the date of agreement, at which time it will be reviewed with the option to renew.

BETWEEN:

Name of your organization: _____

Address: _____

Hereinafter known as *YO*

AND:

Name of your twin organization: _____

Address: _____

Hereinafter known as *YTO*

This agreement will commence on *(insert date)* and will remain in effect for *(insert number of years)*, after which it will be reviewed with the option to renew.

Whereas *YO*, a registered non-profit Society incorporated under the *Society's Act of (insert your province)*, and *YTO*, operating in *(insert city and country of YTO)*, wish to enter into a twinning project for the purposes of providing care and support that adheres to the philosophy of hospice palliative care to *YTO* patients and their family members, and

Whereas the Canadian Income Tax Act requires that, as a registered charity, YO must direct and control the administration of its charitable activities, and

Whereas *YO* wishes to enter into an agreement with *YTO* to assist in the administration of the charitable activities of *YO*.

Therefore:

YO and *YTO* agree, to the mutual benefit of both parties, to collaborate and cooperate in the administration of charitable activities that meet the guidelines set out by the Canada Customs and Revenue Agency, the *Society's Act of (insert your province)*, and the Constitution and Bylaws of *YO*, and that adhere to the philosophy of hospice palliative care as set out in the Canadian Hospice Palliative Care Association's "A Model to Guide Hospice Palliative Care" (March 2002), and

YO agrees to generate charitable donations and distribute funds to *YTO* to facilitate the delivery of hospice palliative care to patients and family members under their care, and

YO and YTO will mutually agree, in writing, to any intended use of charitable funds directed from YO to YTO, prior to the release of funds. Use of funds may include, but will not be limited to, the following:

- a) hiring professional staff who provide direct patient care;
- b) purchase of medications for patients;
- c) purchase of equipment and educational materials used to facilitate care; and
- d) other special projects that are deemed acceptable by both parties.

YO and YTO will agree upon an annual budget at least one month prior to the date of the initial distribution of funds from YO to YTO, and thereafter at least two months prior to the first day of January each year, which is the first day of YTO's fiscal year, and YO will make regular payments of charitable funds to YTO at agreed upon intervals, and YTO will provide written quarterly progress reports to YO regarding the use of transferred charitable funds, and agrees to allow visiting representatives of YO to inspect the project on reasonable short notice.

Any deviation in the use of funds from that set out at the beginning of each fiscal year will be considered a "special project" and must be applied for in writing to YO.

YO may, at any time, withhold payment of charitable funds if documentation and progress reports are deemed unsatisfactory by YO, or if it is felt that the actions of YTO are in direct contravention of Canada Customs and Revenue Agency guidelines, and/or the Society's Act of (*insert your province*), and/or the Constitution and Bylaws of YO.

For audit purposes, both parties will keep accurate accounts of all receipts and expenditures of funds designated by donors for the Twinning Project in a separate general ledger account within their respective accounting systems.

Agreed to this ____ day of _____, 200__

On Behalf of the YO - YTO Hospice Palliative Care Twinning Project:

For YO:

Witness

Name and position

Witness

Name and position

For YTO:

Witness

Name and position

Witness

Name and position

APPENDIX G

Twinning Project Pledge Form

Name of Your Organization: _____

Address: _____

Phone: _____

Email: _____

Name of Project: _____

Project donor details:

Name: _____

Address: _____

Phone: _____

Email: _____

I wish to become a partner with *(Your Organization's Name)* in supporting hospice palliative care work in *(Country)* through the *(Name of your twin organization)*.

1. I am willing to make a monthly donation in the amount of:

\$10 per mo.

\$100 per mo.

\$20 per mo.

Other _____

\$50 per mo.

to be automatically deducted from my credit card

OR _____ with post-dated cheques.

**2. I am willing to give a one-time gift of _____
to help with special projects at your organization's name.**

CREDIT CARD INFORMATION

Card type: _____

Card number: _____ Expiry: _____

Name on credit card (please print): _____

Signature: _____

Cheques to be made payable to *Your Organization's Name*

APPENDIX H

Progress Review

Date: _____

We have completed the following steps:

- _____

- _____

- _____

- _____

- _____

- _____

- _____

Our next steps will be:

- _____

- _____

- _____

- _____

- _____

APPENDIX I

Project and Partnership Evaluation

(The information in this Evaluation has been adapted from material taken from the Interagency Coalition on AIDS and Development's twinning manual).

Effectiveness of the project

How has the twinning project affected team members' learning new skills, methods, or knowledge in one or more of the following categories?

- Care, treatment or support strategies
- Legal, ethical and human rights initiatives
- Developing and strengthening a formal network
- Policy development and advocacy
- Strengthening communication skills
- Strengthening fundraising skills
- Strengthening management skills (change, time, or project management, strategic planning)
- Community-based research
- Board of directors development
- Training and technical assistance on how to use research to improve and assess service delivery

Extent to which you met your goals

- Number of participants
- Amount of materials developed
- Amount of materials distributed
- Number of workshops delivered
- Number of patients and families served

Project impact

- Behaviour change
- Knowledge change
- Attitude change
- Policy change
- Practice change
- Change outside the twinning project

Vision and mission

- The twinning project has advanced each twinning partner's own organizational mandates.
- The achievements of the twinning project directly relate to the intended purpose of the partnership.
- Partners have enhanced understanding of their respective priorities and perspectives.

Effectiveness of the partnership

How has the twinning project affected the following?

- Capacity building
- Identification of best hospice palliative care practices
- Increased program effectiveness
- Broadening horizons
- Relationship building
- Solidarity
- Building a global movement

Value of the partnership

- Level of support and resources to sustain the partnership and to meet the needs of your project plan.
- Extent that both organizations have engaged in the partnership.
- Equality.
- Equal weight given to input from both parties.

Success of the project

- Partners have achieved planned activities with designated resources (time, funding, materials and staff).
- Both partners felt there was an equitable level of control over and responsibility for the project.
- Both twinning partners felt that their input was valued and incorporated into the project. Both partners perceive positive working relationships.

Lessons learned

- Identify barriers and challenges.
- Identify strategies to avoid or address problems, should project continue.

Future Plan

- Describe how you will end the project.
- Make recommendations for the future.

WEB REFERENCES

Place electronic link to the following documents here:

- 1) Sample Completed Project Plan
 - 2) Sample Letter of Interest
 - 3) Sample Friendship Agreement
 - 4) Sample Agency Agreement
 - 5) Sample Priority List
-