

Sample Generic Outline

**Suggested Elements in a CSOC Interagency Agreement:  
An Outline**

- I. Statement of agreement between two or more agencies, or a broader collaborative. This collaborative should have a mission, core values and goals/objectives (could be referred to as an appendix.)
- II. Agreement as to the target population to be served.
- III. Agreement to the collaborative or program features. This may be broken out under specific program components. Definition of program features should elaborate on the specific services to be provided, estimate of average of service duration for clients served, case planning and conferencing, delineation of provider disciplines and supervision arrangements, etc.
- IV. Financing arrangements. May include one or more of the following options:
  - A. Pooled fund to develop and implement a program
  - B. Inter-departmental/interagency sub-contracting of funds or “journaling of funds” between departments
  - C. In-kind contributions (i.e., could include staff assigned, office space, administrative staff, etc.)
  - D. Any waivers used to utilize categorical funds more flexibly should be mentioned in this section
- V. Agreement as to roles each entity will have in the governance and service delivery of the program.
  - A. Governance Roles
    - 1. Agency/institution participation in the collaborative policy making.
    - 2. Appropriate designation of administrative/leadership staff expected to sign-off on the agreement.
    - 3. Designation of administrative/leadership staff who will have decision-making responsibility over funding, program, personnel and service authorization matters.
    - 4. Designation of staff to troubleshoot or problem solve regarding program or service delivery matters (this item should also outline a “chain of command” to be used to resolve or mediate conflict, with the goal of resolving the conflict at the point closest to the source.
  - B. Service Delivery Roles
    - 1. Designation of specific service delivery roles within either an interagency team, a broader collaborative team, or a cooperative group working relationship.

2. Service delivery roles include:
    - a. Care coordination role (who is in charge of the case)
    - b. Case management
    - c. Roles specific to disciplines (i.e., medical, clinical, casework, education, family support/outreach, other community work, law enforcement, court liaison, etc.)
  3. Expectations of communication between team, collaborative or cooperative players. (See Confidentiality Section)
  4. Expectations regarding how service authorization, reauthorization and discharge decisions will be made.
- VI. Agreement as to space allocation by each agency or department.
- VII. Agreement to principles of confidentiality or privileged communication between clients and professionals.  
Adherence to laws and regulations governing confidentiality and privileged communication.  
Agreement to content areas that are appropriate to advance productive interagency, collaborative or cooperative service delivery.  
Agreement and commitment to process to resolve conflicts that may arise regarding differences between workers regarding what information can be shared.
- VIII. Agreement to Program Evaluation
- A. Agreement about performance outcome measures
  - B. Agreement about process for evaluating programs
  - C. Agreement to client consent policies for participation in program evaluation
  - D. Agreement about way data will be presented
  - E. Commitment to appropriate program refinement or enhancement to remedy undesired outcomes
- IX. Commitment to Process for reviewing and renewing Agreement at specific time intervals. (This should specify who will be involved in the update/modification process.)
- X. Time frame—Length of time the Agreement will be in force.