Pre-Implementation Wrap-up Summary Report

Contract Efficiencies and Flexibility Initiative

BRITISH COLUMBIA | Ministry of Children and Family Development

April 2015

Contract and contract practice inconsistencies and the inefficiencies resulting from them are the motivators for the changes introduced through the Contract Efficiencies and Flexibility Initiative.

This document includes:

- Introduction
- Assessment of the Project's Performance
- Summary of the Accomplishments
- The Pre-Implementation Accomplishments
- Lessons Learned
- Next Steps

Appendices:

A: Project Core Document Checklist

B: PLEA Global Agreement Process

C: Agency Deliverable Assessments

We **Agree** with and **Approve** this report.

_____ *Date:* _____	_____ *Date:* _____
Allison Bond, ADM, Service Delivery Ministry of Children and Family Development	**Angie Kwok,** Executive Director BC Centre for Ability
Date: _____	*Date:* _____
Tim Agg, Executive Director PLEA Community Services	**Caroline Bonesky,** Executive Director Family Services of Greater Vancouver
Date: _____	
Ann Smith, Chief Executive Officer, Axis Family Resources Ltd.	

The Ministry of Children and Family Development (MCFD) Contract Efficiencies and Flexibility Initiative (CEFI) is a pilot project with four agencies located in British Columbia's North, Interior and Lower Mainland. These agencies include: Axis Family Resources Ltd. (Axis), PLEA Community Services (PLEA), Family Services of Greater Vancouver (FSGV) and BC Centre for Ability (BCCFA). This document summarizes the pre-implementation phase of the initiative. It provides an overview of the project's performance, accomplishments, lessons learned, outstanding work and the next steps.

Goal

To increase administrative and contract management efficiency and to enhance contract reporting

MCFD works with community social service providers in delivering approximately 50% of the Ministry's services to children, youth and families. The Ministry has worked with Axis, FSGV and BCCFA and PLEA for more than two, three and four decades respectively. The successful partnership between the agencies and the ministry and the good work of the agencies is represented in the fact that timely, quality services have been provided to children and families.

Over the years, contracting processes and practices have evolved across the province based on local experiences, practices and circumstances resulting in inconsistency. The changes to be introduced through the collaborative efforts of MCFD and our service provider partners in CEFI are aimed at creating greater consistency, efficiency and relevance in information sharing. Throughout the implementation of these changes, care and consideration will be taken to ensure that past practices are well understood to mitigate negative impacts.

Assessment

To be conducted over a one-year evaluation period

Final Evaluation Report March 2016

The pilot agency partners stated that, while they were happy with the progress achieved, the work did not progress as far as originally desired. The implementation of the pilot is anticipated to improve contracting efficiency through reducing the reporting requirements and contract administration associated with agency contracts; and facilitating use and reviews of the contracts through standardized contract documents and practices.

Evaluation of the implemented work will further define the success of this project. These results will be used to scale-up the project. Discussions on how best to scale the project up are underway.

Objectives

Amalgamate contracts to reduce number of MCFD contracts with each agency

Create **consistent** contract **service deliverables** language by program types

Develop **consistent financial reporting**

Develop standard definitions and ensure **relevant reporting** indicators

Review and develop **outcome indicators** for inclusion in contracts, as required

Ensure **current policy** and standards are consistently cited **in contracts**

Develop **principles** for the treatment of **savings** achieved as a result of this project

Define contract management accountability and responsibility when **multiple Service Delivery Areas (SDAs)** are involved

Review service delivery models and **enhance contract flexibility** to maximize services

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Individual agency **scope statements** (right-click to see the statements)

Axis Family Resources Ltd.   PLEA Community Services   BC Centre for Ability   Family Services of Greater Vancouver

The scope statements outline the work associated with each agency and constitute the baseline for performance assessment purposes.

What could not be achieved   Will be addressed through …

Embed policies and standards in contracts

Document the relevant policy/standards; work with the MCFD Policy Branch to confirm the policies and add the information to the MCFD Service Provider webpage.

Re-allocate funds and resources in contracts

MCFD requires reporting on program funds, by way of specific service lines and location, which does not support the re-allocation of funds within a contract, and makes contract amalgamation and reduction of detailed financial reporting challenging. The issues have been identified and an option analysis for an alternative approach will be undertaken in fiscal year 2015/16.

Review service delivery **models**

Providers working across multiple SDAs continue to need to work with individual Community Services Managers (CSMs) and Executive Directors of Service (EDS). An option analysis for alternative points of contact will be explored in fiscal year 2015/16.

Current vs. Future State …

the Accomplishments under the CEFI to date

Current State	Future	Accomplished
Inconsistent contract nomenclature / definitions Inconsistent contract language and service expectations, requiring agencies to manage similar contracts differently Too many contracts / irrelevant or unused reporting / too much output reporting, not enough focus on outcomes No clarity on service flexibility / overwhelming administrative processes Contract structure does not support 20% of families with multiple needs / services provided are what is available No flexibility to adjust funding to demand / cannot share specialized skills when hiring to contracts	**Reduced number of contracts**, including development of umbrella (global) agreement	√ Amalgamated and reduced 6 Component Service Agreements (CSAs) to 2 with Axis √ Amalgamated contracts with FSGV and PLEA (rolled up 25 contracts with PLEA) √ Global model for residential contracts
	Standard residential and non-residential contract format, layout, language with clearly defined deliverables	√ Two standardized templates for individual-specific contracts for family care and staffed residential resources √ Deliverables more clearly defined and standardized √ Policies and standards cited in contracts (in progress)
	Standardized, streamlined and relevant output reporting – plus increased focus on outcome reporting in contract reviews	√ Consensus on "service hour" definition for use in the Pilot contracts √ Standardized and reduced output and financial reporting √ Outcome measure for effectiveness embedded in FSGV and BCCFA contracts
	Increased flexibility to move program funding and resources within contracts and across Service Delivery Areas to meet service need	X *Movement of funds and resources within contracts–not achieved* √ Standardization of the description of the staffing model

The project documents are listed in Appendix A.

Accomplishments related to each agency's objectives are available in Appendix C.

The forum used to move through the development of the changes was a positive experience and supported a greater understanding of the issues and opportunities for innovation and change.

■ To be evaluated ■ Complete ■ On Track ■ Risk of Delay ■ Delayed ■ Not Started

Objective and Status		Accomplishment
Reduce the number of contracts within each agency: Amalgamate contracts in PLEA and FSGV and reduce Client Service Agreements (CSAs) in Axis	■	√ Amalgamated FSGV Family Preservation, Project Parent, CYSN, and Family Parent Support contracts. √ Reduced number of Axis Client Services Agreements to two for the Interior and North. √ Amalgamated the 25 child specific residential contracts into one Global contract and merged the Genesis Day Program and Youth Justice residential contracts.
Create consistent contract service deliverables language by program Standardize the non-residential and residential contract templates with consistent service deliverables language	■	√ Created two standard residential child specific contract templates: one for Family Care Home model and one for staff residential. √ Standardized the non-residential contract template for Family Preservation contacts in AXIS and FSGV – this format can be rolled out across for all non-residential contracts in the ministry. √ The new individual-specific residential contracts to be rolled out across the province
Ensure current policy and standards are consistently cited in contracts	■	√ Known policy has been cited in the contracts and includes a clause to not limit sections #3 and #8 of the current contract Terms and Conditions which provides for compliance with all relevant legislation and policy. √ Further work needs to be done to ensure that all of the policies and standards are available. To ensure that the information is readily accessible, material will be placed on the MCFD Service Provider webpage.
Develop standard definitions and embed relevant output reporting indicators into contracts	■	√ Direct Service Hours were approved as the standard indicator to be used– includes emails and texts. Output reporting templates have been embedded into agency contracts. √ Standardized descriptions of staffing models are articulated in the Pilot contracts. √ The PLEA monthly summary report, capturing service hours by worker, by client and by 16 categories of hours, is no longer required for non-residential contracts. √ Relevancy of output indicators to be evaluated.
Develop and include outcome indicators in contracts	■	√ Addition of Outcome measure for effectiveness added to contracts for FSGV and BCCFA.
Review service delivery models and enhance contract flexibility; Develop a global model for individual-specific residential contracts; define accountability and responsibility for staff when multiple Service Delivery Areas are involved	■	√ Global contract model, including roles and responsibilities, designed and approved; can be used as the standard practice framework for all multi-SDA, individual-specific contract management practices. (Appendix B). √ Merged the current 24 contracts with PLEA achieving $150K in savings. The PLEA contracts are to be developed over June / July. √ Also addressed existing practice issues related to out-of-town placements. √ Refer to 2.2 for status on flexibility
Streamline and simplify financial reporting / reduce the number of PLEA cost centres	■	√ Consistent Financial reporting, as defined by the Financial Reporting and Management Requirements, has been rolled out across the province. Work needs to be done to ensure compliance and consistency √ For financial reporting purposes a number of cost centres in PLEA were reduced

Stakeholders

√ Ministry Executive sponsorship and Service Provider senior leadership active participation to ensure sustainability and implementation and the support to move and continue with the changes identified in this pilot was invaluable

√ The value and need for more frequent, less fragmented dialogue with all of the stakeholders engaged was important to gain a better understanding of the challenges and opportunities; creating the means to have more dialogue should be considered for future work

√ Defining the work scope earlier in the process and with more proactive consultation with ministry staff prior to execution may have resulted in reaching more objectives

√ Competing ministry priorities limited consultation time; impacting timely completion of some work

Complexity

√ Some changes were more complex than expected due to Practice issues; Practice issues that surfaced, related to the placement of children and youth in out-of-town locations - these issues have been addressed with additional time and commitment from Service Delivery staff to try this as a pilot

√ Funding for services sits within each ministry Service Delivery Area or even more granular to each Local Service Area; this model does not support a re-allocation of funds across services with a Service Provider and creates the need for more detailed financial reporting

Pilot - the Opportunity to Try New Things

√ Some changes were easier to make given that there was recognition that those involved wanted to try something new and measure the results rather than needing to permanently commit to a change which was thought to be beneficial but evidence was not available

√ The inclusion of an outcome measure into the contracts was a major success as it represents a step towards reporting on outcomes which has been discussed for over 10 years, but never acted upon; a pilot enables trying changes

√ Reduced reporting and standard contracts sets the framework for consistent practices

Constrained Timelines

√ Constrained timelines were positive in the sense that changes were implemented and the impacts can be evaluated; the work to establish the pilot is a tangible start towards the resolution of long standing issues and can be observed in practice

√ Constrained timelines did mean that not all agency requests were achievable within the timeframe

√ Tension between meeting project timelines and time required to allow for change management

Evaluation Framework

√ After the scope and objectives were identified, it would have been beneficial to put the evaluation framework in place and to work on collect the baseline measures at the beginning of the process

√ Measuring the efficiency savings will be difficult given that percentages of people's time associated with contract administration

√ Efficiency gains are being absorbed by policy changes which are impacting Service Provider administrative processes (e.g. additional criminal records check requirements)

- Post the Wrap-up report externally

- Finalize the CEFI Evaluation Plan

- Implement the pilot - evaluate the experiences quarterly

- Roll out the new individual-specific residential contract template

- Roll-out the new non-residential contract format, service definitions and outputs after evaluation

- Continue creating conditions and cultural shifts to encourage and support change; determine and implement continuous improvement best practices; including work on multi-year contracts over $2M

- Work to ensure compliance with consistency in financial reporting

- Recommendations for decision by March 1, 2016

- Develop plans and communications with regard to changes and training

- Determine how successes of this project can be scaled up / rolled out to other agencies or provincially; e.g., standard contract template, Global contracts, amalgamation and outcomes

Appendix A

Core Project Documents Checklist

	Document	Status	Location
1	Project Charter	Completed and approved – Sep-26-2014	Charter - on SharePoint
2	Project Plan (detailed)	Completed and approved – Aug-08-2014 – Updated regularly	Plan - on SharePoint
3	Agency Scope Statements	Completed and signed off – Oct 25, 2014	Statements – on Website
4	Records of Discussions and Decisions (minutes)	Completed after each meeting	Minutes – on SharePoint
5	Evaluation Plan and Forms	Completed May 2015	Evaluation Plan – on Website
6	Savings Treatment Principles	Discussed and Approved - April 23, 2015	Discussion only—no material

■ A central liaison person acts as a gatekeeper for all referrals (making all placement decisions) and manages all PLEA homes (e.g. home visits every 90 days, annual reviews, and annual environmental safety checks).

■ All 'Places of Service' will become part of the gatekeeper's caseload. The gatekeeper will also gather information on issues from the 'Places of Service' and will be the primary contact for PLEA related to policy interpretation. All PLEA referrals from the Lower Mainland Service Delivery Areas (SDAs), Out of Town SDAs, and Delegated Aboriginal Agencies (DAA) will be given the same service priority. SDAs and DAAs from the Lower Mainland will continue to provide direct guardianship services for the children and youth placed in the PLEA Homes.

■ **Benefits include:**

√ Insight to the service provider operations and consistency in policy interpretation

√ Central coordination of all communications and issues management

√ The out-of-town placement decision is more likely to be accurate because of community and service provider knowledge

√ Consistency in resource support to homes

√ Enforcement of planning, as there is authority to not make referrals until planning is completed

√ All PLEA homes are accessible to the worker as they are all located in the Lower Mainland

√ Easier contract administration as contract management staff will contact this central liaison person only to clarify extra costs on monthly invoices

Axis Family Resources Ltd.

Deliverables and Status		Comments
Standardized and consistent contract template and language for child-specific residential contracts	🟩	Standard contract developed
The 20-bed global residential contract is re-written for clearer deliverables and accountability	🟩	Contract re-written with clear deliverables
Flexibility in contracts to provide services in relation to need across the service type and geography rather than being tied to funding amounts	🟩	Family Preservation contract standardized; standardized financial and output reporting
Reduced number of Client Service Agreements to act as umbrella for multiple residential contracts	🟩	Reduced Client Services Agreement to two – one for the Interior and one for the North
Consistent and improved contract practices; specifically in district offices for Resource Teams by having template language available for future use	🟩	Template language ready for use; Practice for out-of-town placements revised/amended
Standardized contract administration practice to have the same number of signed copies of contracts from all Ministry offices	🟩	Standard practice defined through contract template; communication to staff required

STATUS LEGEND

🟪 *To be evaluated*   🟩 *Complete*   🟦 *On Track*   🟧 *Risk of Delay*   🟥 *Delayed*   ⬛ *Not Started*

BC Centre for Ability

Deliverables and Status		Comments
Better organized, simplified and standardized non-residential contract schedules, including service descriptions, deliverables / outputs and financial information	🟩	Standardized contracts for language and layout; with standard output and financial templates
Reduced and more relevant output reporting requirements and the addition of outcome reporting in the contracts	🟩	Standardized and reduced reporting requirements; *relevancy to be determined*
Flexibility in contracts to provide services in relation to need across the service type and geography rather than being tied to	🟥	*Unable to meet target to move funding within contracts or across communities.*
Options for the development of multi-year contracts	🟩	The ministry is working with Treasury Board on options for
Increased flexibility in the deployment of staff within the same	🟥	*Not achieved due to existing ministry structure.*
Improved service planning with an annual meeting of all of the Community Service Managers (CSM) associated with the contracts to ensure consistency between Local Service Delivery	🟩	*Yet to be evaluated; Process and structure to be determined*
Training for ministry staff on the changes	⬛	*Part of Phase II - Post evaluation*

Family Services of Greater Vancouver

Deliverables and Status		Comments
An amalgamated (global) contract for Family Development Services, CYSN and Foster Care Support contracts	🟩	Standard contract for non-residential contracts developed
Increased flexibility in contracts to better match services with client needs	🟥	*Unable to meet target to move funding and resources within contracts or across communities*
Simplified and standardized non-residential contract schedules with better organized service descriptions, deliverables / outputs and financial information	🟩	Standard non-residential contract developed
Streamlined and relevant output and outcome reporting requirements	🟩	Direct service hours (including texts and emails)
One central intake process for the non-residential services in Family Development, CYSN and Foster Home Support (service model redesign)	⬛	*Out of scope for this Phase of the Pilot – Part of Phase II*

STATUS LEGEND

🟪 *To be evaluated*   🟩 *Complete*   🟦 *On Track*   🟨 *Risk of Delay*   🟥 *Delayed*   ⬛ *Not Started*

PLEA Community Services

Deliverables and Status		Comments
Simplified and standardized non-residential contract schedules with better organized service descriptions, deliverables/outputs and financial information	🟩	Standardized contracts for language and layout; with standard output and financial templates
Simplified, streamlined and relevant output and financial reporting requirements	🟩	Standardized and reduced reporting requirements; *relevancy to be determined*
Consolidation of Vancouver's Genesis Day Program and Youth Justice contracts	🟩	Genesis Day Program and Youth Justice residential contracts amalgamated
Consolidation or standardization of the Child-Specific IRCS and SFF services contracts	🟦	Contract templates to be drafted
Increased flexibility in the deployment of staff and funding within the same contract	🟥	*Unable to meet target to move funding and resources within contracts or across communities*
Improved service planning with an annual meeting with all Community Services Managers to ensure consistency between local service delivery areas	🟪	*Yet to be evaluated; process and structure to be determined*
Development of a flexible global contract for residential services for infrastructure/baseline costs	🟦	Global contract to be in place July 2015
A central representative for intake and a central representative to oversee agency service quality for the global residential contract	🟦	On track to be implemented with global contract July 2015
Training for ministry staff on the process changes	⬛	*Part of Phase II - Post evaluation*

Implementation of the pilot is anticipated to improve contracting performance and efficiency by way of reducing the reporting requirements and contract administration associated with agency contracts; and facilitating use and reviews of the contracts through standardized contract documents and practices.

MCFD
Contract Efficiencies and Flexibility Initiative

A Pilot Project with
Community Social Service Providers