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# Coromandel Independent Living Trust

## Integrated Funding Contract

*A new collaborative outcomes focused contracting and funding process which has enabled five different central government agencies to have a single funding contract with the Coromandel Independent Living Trust.*

### The Parties

#### The Provider

Coromandel Independent Living Trust (CILT)

#### The Funders

Ministry of Health

SPAN Trust

Vocational Services

Child Youth and Family Services (CYFS)

Family and Community Services

Enterprising Communities

### Background

The vision of the Coromandel Independent Living Trust (CILT) is to enhance the wellbeing of all people in the upper Coromandel Peninsula. The Trust started in 1994 with a focus on disability issues but has since become a broad based social services provider to the 3000 residents of the upper Coromandel. The Trust undertakes a range of activities including providing community information, community development, employment, housing, and values-based education. Services are generally funded via service contracts with a range of government organisations based in Thames, Hamilton, Tauranga, and Auckland. CILT has worked hard to build up relationships with its local and central government funders and is generally viewed as an effective, high performing, community social services provider.

In 2004 the Ministry of Social Development (MSD)-led Funding for Outcomes initiative was launched aimed at improving the processes used to contract with organisations funded by several government agencies. The aim of the project was to bring an organisation's bilateral contracts together into either a single integrated contract, or a cluster of contracts, to improve service delivery and reduce compliance and transaction costs.

Through focusing on shared outcomes it was hoped that community based providers and government would also be able to work more closely together to identify the needs of individuals, families, and communities thus promoting better collaboration between government funding agencies and more effective use of resources to improve service delivery and community wellbeing outcomes.

Given that CILT met government prerequisites for participation (ie. robust governance structure, clear strategic vision and mandate, proven record in service delivery etc), they approached MSD to participate in the pilot integrated contracting process. The CILT integrated contract was signed in 2006 and was the first of its kind in the Waikato area, bringing together five different contracts with five government funders.

### **Benefits of Putting Pen to Paper...**

- streamlined and common reporting;
- less administration for CILT through having one rather than many contracts to administer;
- an outcomes focus and holistic approach to service development and delivery, including a platform for shared discussion with government on local issues and potential ways of addressing them;
- strengthened relationships between government funders and a more balanced relationship between funders and CILT;
- for CILT, moving to a three year fund agreement from the traditional annual contracting cycle.

### **Putting it Together...**

In September 2004 CILT became involved in one of the first ever integrated contract processes. At this time, an Auckland based MSD relationship manager was assigned the 'case' and made several visits to CILT and to other government funders to see if they wanted to be part of the process and to outline what would be involved and potential costs/benefits.

Given its newness, and the conceptual nature of the initial funding for outcomes vision, there was some initial scepticism by some government agencies and field workers as to the value of the project. There was also little pre-prepared material about the integrated contracting process. Much of this was later developed after the initial pilots were undertaken. The relationship manager had to invest considerable time explaining the project to the funders and encouraging their participation. Eventually there was agreement to sign a "Working Together Charter" which enabled the project to continue.

Through the relationship manager, CILT provided to the funders group extensive information about the services they currently provided, their current reporting requirements, and their aspirations for future social service delivery to their community. From this, and existing individual bilateral contracts, a draft set of outcomes and service objectives was developed under which all five government funders could align their funding, monitoring, and reporting requirements.

Building up from the standard Funding for Outcomes template an integrated agreement was drawn up and signed by the Ministry of Social Development and CILT and then by individual agencies one by one. It took 18 months to get the agreement negotiated and signed.

### **Key Agreement Features...**

- jointly agreed outcomes to which the provider reports in a simplified way yet still enables legal requirements to be met;
- joint provider/funder meetings that are held six monthly to review progress and raise any issues.

### **Biggest Challenges...**

- distance: with the provider based 2.5 hours away from funders, getting everyone together on a regular basis just wasn't easy;
- getting a government funder willing to take on the local relationship management role, with key issues around capacity, training, resources and support for the role;

- ensuring funders were effectively supported and resourced by their own agencies to participate in the integrated funding process;
- aligning different agency compliance systems and getting shared understanding about the opportunities that integrated and holistic funding and reporting systems can achieve ie. five pairs of government eyes on a contract and face-to-face meetings rather than one agency at arm's-length receiving a written report.

### Things That Helped...

- getting shared agreement on the outcomes and enabling funders to see how their individual contracts clearly linked to these;
- persistence and patience, understanding that changing cultures and systems can often take a lot longer than initially envisaged;
- some strong leadership and encouragement from Wellington to get the agreement process completed;
- having many funders now who have been through other integrated agreement processes and know what to expect.

### What Has Happened Since...

Since the signing of the integrated agreement in April 2006, changes and gaps in the MSD relationship management role meant that the integrated reporting and joint review meetings did not actually take place in 2006 as proposed, with CILT continuing to report to agencies individually as it always had.

*"The role of relationship management is critical and we understand the specialist skill set so much better now. Firstly it's about understanding both the agencies' and provider's perspectives. This means brokering, persuading, doing, negotiating, and making things happen."*

*- Toa Faneva, Senior Contracts Advisor, Family and Community Services*

However, this gap was closed in October 2006. A Funding for Outcomes Contract Advisor picked up the CILT contract to support the parties and assist in CILT's first review. A new draft monitoring and reporting schedule was presented to a joint meeting in February 2007, with one of the local funders agreeing to take over the relationship manager role.

*"In reality the process has been much slower than we would have liked but we really believe the potential for good stuff is still there. There is a willingness for an integrated approach but the 'how to do it' is still somewhat tricky for government."*

*- Mike Noonan, Chief Executive, Coromandel Independent Living Trust*

Another joint review meeting is planned for August 2007 where CILT will report on how the new draft reporting template works from their perspective. Both sides now feel confident that the integrated process is back on track, with both funders and providers feeling much more supported.

*“Funding for Outcomes has learnt that we need to have a role post agreement signing, for six months plus and that those taking on the relationship management roles need specific training. The reality of many early integrated contracts is that once they were signed everyone thought their job was done. It wasn’t. The monitoring and review phase of the integrated contract is a process where relationships continue to be forged and best practice principles can be embedded into the contract.”*

*–Iria Pene, National-Regional Contract Advisor Funding for Outcomes,  
Ministry of Social Development*

### **Best Advice For Others...**

- be patient and have faith, sometimes timing is everything;
- have clear expectations about the benefits of collaboration for your organisation and client base;
- take advice from others and look to regional and national groups for support and advice if you think you need it;
- maintain strong relationships outside of the collaboration table as well;
- take the time to build trust by talking through with people what’s going to happen and what they can expect;
- acknowledge those who really share the vision/philosophy and build on those relationships.



Coromandel Independent Living Trust Chief Executive, Mike Noonan and his staff outside their building

## COROMANDEL INDEPENDENT LIVING TRUST

### Outcomes

People in the Coromandel who are in need or have a disability have more opportunities to live independently.

### Client group

People living in the Coromandel with a disability or who are disadvantaged

### Services delivered to contribute to achieving the outcomes for the client group

#### 1. Assess needs

Activity	Volume
Assessments completed	
Plans developed and monitored	

#### 2. Provide information and services

Activity	Volume
Provide information, advice and advocacy for people who reside in the Coromandel district	180
Promote family wellbeing for families living in the greater Coromandel area (abuse prevention focus)	14 families
Provide information about the services available to disabled or disadvantaged individuals	

#### 3. Coromandel On Track

Activity	Volume
Project management training	1
Health and safety training	11
First aid training	11
Driver licensing	4
Training in the use of power tools	11
Bush craft/outdoors/safety course	11
Staff induction	11
Staff linked to NZQA framework	11
Literacy and numeracy workshop	11
Treaty of Waitangi workshop	11
Conflict resolution workshop	11

#### 4. Community services

Activity	Volume
Assist individuals into paid employment	
Provide on-the-job support for individuals who enter the workforce	
Support migrants into labour market	
Create jobs – unsubsidised	
Create jobs – subsidised	
Create community-owned businesses	
Create new or improve attraction/tourist facilities	
Support individuals into training places	
Provide transport to health or education providers as identified by CILT	

#### 5. Vocational services

Activity	Volume
Individuals who participated in vocational services for people with disabilities	36
Number of individuals who participated in the vocational services for people with disabilities with a development plan	
Number of hours individuals participated in vocational services for people with disabilities	15,000hrs
Participant hours in wider community by individuals attending vocational services for people with disabilities	5,400hrs
Participant hours in sheltered employment during reporting period	4,800hrs

#### Results of the services delivered (was anyone better off?)

You will report of the following **results** to show progress in the reporting period towards achieving the expected outcome for the client group.

In relation to individuals, you will report on the number of:

- Increased level of information and advice sought
- People assisted into paid employment
- People supported into training places

In relation to whanau, you will report on the number of:

- Increased level of information and advice sought
- Whanau living in a safe and stable living environment

In relation to the community, you will report on the number of:

- New jobs created
- New businesses created
- New opportunities created

(See Appendix 2 – Six Monthly Service Report for the Integrated Contract for CILT)

## APPENDIX 2

### SIX MONTHLY REPORT FOR THE INTEGRATED CONTRACT FOR COROMANDEL INDEPENDENT LIVING TRUST (CILT)

[Reporting period]

[Date report completed]

#### 1. Data report

##### In relation to individuals

Result	# Achieved
Increased level of information and advice sought	
People assisted into paid employment	
People supported into training places	

##### In relation to whanau

Increased level of information and advice sought	
Whanau living in a safe and stable living environment	

##### In relation to the community

New jobs created	
New businesses created	
New opportunities created	

#### 2. Narrative Report

Provide a narrative report that shows:

- trends and developments in the reporting period
- any actions and/or support required that will help achieve expected results