



ANGILCAN FAMILY CARE :: FINANCIAL CAPABILITY SERVICE COLLABORATION

The Ministry of Social Development (MSD) announced it would cease all budgeting service contracts nationally from 31 October 2016.

Responding to the announcement, 11 budgeting services from across Otago and Southland decided to come together on 25 February 2016 to discuss potential responses to MSD's newly proposed financial capability service.

Resulting from this meeting, eight providers expressed interest in having further collaborative discussions in response to the changes. To begin with, Dunedin's three MSD incumbent Budgeting providers; Anglican Family Care Budgeting Services (AFC), Corpac Trust, and Dunedin Budget Advisory Services agreed to further explore opportunities for greater collaboration. They sought and were granted \$10,000 toward the cost of developing a resource map and to scope out potential collaboration opportunities.

An independent capability-development facilitator was engaged for the mapping exercise and to identify client and referrer needs - and to then facilitate a potential partnership model for the Dunedin and Otago region. It was hoped this would lead to improved quality and effectiveness of services, better understanding of community needs and a more targeted response.

The Working Together More Fund (WTMF) grant enabled this to happen. A local consultant was engaged, providing an independent perspective, time and expertise to the process. It was noted in an early outcome of the scoping exercise that there was benefit seen in extending from three participating partners to the eight interested potential collaborators spanning across north, south and central Otago as well as Gore, Invercargill / Southland district.

Following initial meetings, the consultant presented a report and framework to guide collaborations. This resulted in six of the eight participating organisations supporting the proposed framework. Craig Ashton, Business Support Manager from AFC says "we worked well together to find ways to reduce costs by around 20% and improve efficiencies to enable resources to be redirected to frontline services - but most importantly of all we established a shared direction, vision and collaborative understanding that what we were doing was adding real value for our clients. We quickly realised the opportunity for creating better services for each of our local communities under the newly proposed service guidelines."

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The six budgeting services, North Otago Budget Advisory, Central Otago Budget Advice, Clutha Budget Advisory, Corpac and Gore & Districts Budget Advisory Services worked tirelessly over many months to assess and analyse the community's needs in alignment with MSD's criteria and definitions around vulnerable client groups. The group developed service guidelines, new and innovative service opportunities through a staff working group, prepared job descriptions, met with community stakeholders and referrers as well as developed a legal amalgamation deed and robust implementation plan. The latter would allow for a seamless staff, client and business transition in time for the new service to be operational by 1 November 2016.

The merger was set to operate as a business unit of AFC and was to have a reference group with representatives from the respective communities across Otago, Gore and Southland District maintaining and honouring the voice of the local people. AFC were to be the fund holder and provide overall governance, management & infrastructure for the merger. This service was to be integrated and supported by AFC's other core services that are designed to support the most vulnerable client group in society. These services include Family Start, home-based social work, counselling, social workers in schools, Restorative Justice, care giving and respite care and being the lead agency for accessing the Consumer Electricity fund.

Craig says "this collaboration exercise was one of the most dynamic and innovative projects I have been involved in. The incredible goodwill and vision of this group helped us prepare very well and strengthened our proposal. Each organisation involved in this merger brought an incredible amount of experience and respect from their community, they were well connected with established local relationships with key referrers, including Work and Income, and other social service providers. All were considered highly performing organisations that exceeded their current MSD contracted expectations and were excited about the new direction of working in a strengths-based way in line with the new service specifications being proposed by MSD's Building financial capability services. This merger also brought together the dynamic of a cross sector partnership between Health and Social development by providing the opportunity for the integration of Corpac Trusts mental health services which could have formed the beginnings of a powerful singular interface and wraparound support for some of our most vulnerable people".

On Tuesday 11 October 2016 (20 days before the new service is required to be operational) AFC were notified they were unsuccessful with their tender proposal. Although disappointed, the participating groups' focus quickly shifted to providing support to the large group of vulnerable clients that needed to be transitioned to the new provider.

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The group was disheartened to realise that through this process, significant gaps have emerged in services. The new MSD contracts were purchasing significantly fewer services, placing many vulnerable families at risk and without services. Some of the existing budget advisory services will continue to operate with reserves for as long as they can to continue to try to meet this unmet need.

Participating organisations have learnt a lot from this process - in particular how building trust and a shared vision for our clients is paramount, and putting your community's needs ahead of your own organisation which is fundamental in truly being able to work collaboratively together. AFC is thankful for the support from the WTMF and the incredible work and commitment from each participating organisations staff and Board of Directors. Craig says "As a group we have built an incredible amount respect and trust for one another which will translate into ongoing working relationships for the future as we continue to deliver other services in each of these areas".

AFC and the other participating organisations also wish to offer every bit of support to the new provider having to set up and establish themselves providing financial capability services into these communities. They will look towards building a close relationship with them as they together support this vulnerable group in need.

