

## **Building Financial Capability**

# **New Reporting methods for F22 and beyond**

Training, with BFC team members Louis, Isobel, Alistair  
Host: Korena



### **Reporting Training excerpt from: Building Financial Capability Zoom Hui for May and June 2021**

A Zui for BFC providers with BFC team members Louis Campbell, Isobel Ryan, Ricky Broderson, Alistair Stewart  
Host: Korena Moon

31 May 1.00 to 2.30 pm  
1 June 8.30 to 10.00 am  
2 June 1.00 to 2.30 pm  
3 June 12.00 to 1.30 pm

E ngā mana, e ngā reo, e ngā iwi  
E rau rangatira ma  
Nau mai, haere mai, piki mai  
Tēnā kotou, tēnā kotou, tēnā tatou katoa  
Kia ora hui hui mai tatou katoa

Warm Pacific greetings

Welcome to you all

## Changes in reporting

### Simplified reporting and more usable data for yourselves and MSD

#### Quarterly reporting

- Enter relevant data into Client Voices OR
- Report using an Excel spreadsheet provided by MSD
- You don't need to do anything more than use Client Voices as normal
- Anonymised information will flow from Client Voices with all appropriate safeguards
- No client data will be shared to MSD



Improvements to the contract reporting process from 1 July 2021-

Goal: simplify reporting by providers and provide more usable data for both yourselves and MSD.

- All BFC providers will report quarterly
- Providers will use one of two reporting options:
  - 1 Enter relevant data into Client Voices OR
  - 2 Report using an Excel spreadsheet provided by MSD.

This will mean you won't need to do anything more than use Client Voices as normal. The process of sharing anonymised information from Client Voices will be between MSD and FinCap with all the appropriate safeguards.

To be clear, no client data will be shared to MSD.

F22 Performance Measure	
<p><i>Data from Client Voices</i></p> <p>For non-Client Voices users, an Excel spreadsheet reporting version is available</p> <p>See the BFC Services Guidelines page 32</p>	Sessions
	Total number of sessions
	Number of Financial Mentor sessions
	Number of group (MoneyMates) sessions
	Number of No-shows to meetings (claim as 0.5 of a session)
	Referrals and clients
	Total number of clients (new or pre-existing) who used the service
	Number of clients active at the end of the reporting period
	Number of new clients in the reporting period
	Number of clients who closed
	Total number of new clients referred
	Who clients are referred by i.e. the services/organisations referring clients to BFC
	Total number of clients referred to other community services e.g. specialist services, family violence providers
	Who the clients are referred to i.e. the services /organisations that BFC providers refer clients to
	Number of clients who attend no more than one session
	Number of clients who attend 2-3 sessions
Number of clients who attend four or more sessions	
Number of clients waitlisted	

If you want more detail, here are the measures you will be reporting:

There’s nothing new; all these can be derived from your Client Voices input (but that doesn’t necessarily mean you’ll see these particular lines in Client Voices).

For providers not using ClientVoices to report, a simplified Excel spreadsheet is available on request from the BFC Team.

You'll see that some of the cells are greyed out - that means the reporting is optional BUT it's better that you report into some or all of the cells if you have that information.

See the BFC Services Guidelines Appendix 1, page 32 onwards

## Other changes

### **Narrative reports**

- Replaced with a quarterly questionnaire
  - the first of these online questionnaires is planned for 1 October

### **Quarterly feedback reports**

will be provided for each provider and regional relationship manager, based on this reporting



### **Narrative reports**

Providers' current narrative reports will be replaced with a quarterly questionnaire. The first of these online questionnaires is planned for 1 October 2021. MSD will send these directly to you, nearer the time.

MSD will send quarterly feedback reports to each of you and your new regional relationship manager, based on their reporting.

Changes to reporting requirements will be reflected in Appendix 3 of BFC providers' Outcome Agreements.

## Client feedback

### Client outcomes reporting

A new client feedback tool to replace the Client Outcomes Measurement Tool will be launched later in June, for the first round of reporting from 1 October 2021

- The BFC team will send you further information, including an information pack
- This will be followed by Zui later this month (June)



A new client feedback tool to replace the Client Outcomes Measurement Tool will be launched later in June, for the first round of reporting from 1 October 2021

The BFC team will send you further information, including an information pack

This will be followed by Zui later this month (June)

## Understanding the BFC workforce

All paid and volunteer financial mentors will

- sign on to the FinCap list of staff, and
- complete foundational training



### OTHER CHANGES

As part of MSD's commitment to increased workforce capability, previously announced changes will become mandatory:

All paid and volunteer financial mentors will be asked to sign on to the FinCap list of staff, and complete foundational training

The following 2 screens have more information on these changes...

## Workforce capability 1

Ensure all paid and volunteer financial mentors are signed on to the FinCap list of BFC staff

[fincap.org.nz/financial-mentor-registration/](https://fincap.org.nz/financial-mentor-registration/)

- Providers have six months to complete this: all staff providing financial mentoring to clients must be listed by 31 December 2021
- This is not accreditation: it's required whether staff have completed their training and supervision period or not
- Financial mentors appointed after 1 July 2021 have six months to complete their listing

BFC Services Guidelines page 20



Ensure all paid and volunteer financial mentors are signed on to the FinCap list of BFC staff (at [fincap.org.nz/financial-mentor-registration/](https://fincap.org.nz/financial-mentor-registration/) )

This web form will be edited; **we are working with FinCap to make sure they don't collect any personal info that we don't want to see.**

- Providers have six months to complete this: all staff must be listed by 31 December 2021
- Financial mentors appointed after 1 July 2021 have six months to complete their listing

This is not accreditation: it's required whether staff have completed their training and supervision period or not

The requirements are set out in the new BFC Services Guidelines page 20

## Workforce capability 2

### All paid or volunteer financial mentors and MoneyMates facilitators must have completed the FMIC training

(or its pre-FinCap equivalents)

- This refers to the training only, not the full certification as a Financial Mentor after supervision
- Providers have 6 months to complete this: all mentors must be trained by 30 December 2021
- Financial mentors appointed after 1 July 2021 have six months to complete their training

BFC Services Guidelines page 20



All paid or volunteer financial mentors and MoneyMates facilitators must have completed the FMIC training (or its pre-FinCap equivalents)

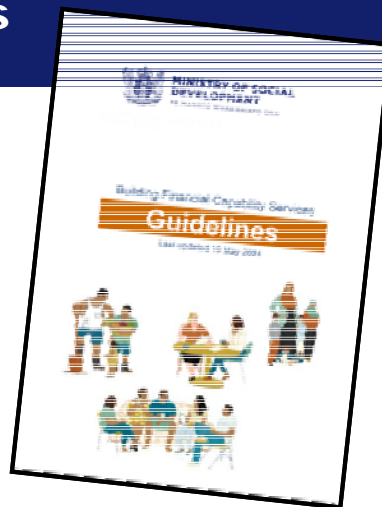
- This refers to the training only, not the full certification as a Financial Mentor which they get after the supervision period.
- Providers have 6 months to complete this: all mentors must have done/be in FMIC training by 30 December 2021
- Financial mentors appointed after 1 July 2021 have six months to complete their training
- FinCap have assured us they have the resources to enable this.



## New Services Guidelines

More detailed information is included in new BFC Services Guidelines and BFC Plus Guidelines

The update in June includes the new COMT



Guidelines available at:

<https://www.msd.govt.nz/about-msd-and-our-work/publications-resources/service-guidelines/index.html#b>



The updated BFC Service Guidelines for BFC core services and for BFC Plus have been uploaded to the MSD website and are available for BFC providers to view and download. Guidelines available at:

<https://www.msd.govt.nz/about-msd-and-our-work/publications-resources/service-guidelines/index.html#b>

In June, the Guidelines will have the new COMT included, so please save the webpage. We'll notify you when the updated BFC Service Guidelines are available.

# Questions and Answers

from the Building Financial Capability Zoom Hui for May and June 2021

---

## *Your questions about...*

Sessions .....	1
Funding and remuneration .....	2
Reporting .....	2
The new Client Outcomes Measurement Tool ...	3
Client Voices .....	3
Service Delivery (Work and Income) .....	4
Listing of Financial Mentors .....	5

(Some questions that came up in multiple hui have been amalgamated for clarity. Some statements that were intended as queries have been reworded as questions.)

## **Sessions**

*Will MSD fund BFC sessions for clients who are not in hardship but would like assistance with goal achievement?*

Yes. That's the intention of altering the wording and removing the requirement that clients will be in financial hardship. This is to move away from the stigma that asking for help can involve, and to move to proactive help.

*How do we report the length of sessions longer than one hour? Our clients prefer to deal with issues for longer sessions (about 90 minutes) rather than come back. Should we take a coffee break and put it as two sessions?*

We want the time with a Financial Mentor to work best for your clients and also want providers to be fairly compensated for their client-facing work.

A session that goes well over one hour (e.g. 90 minutes) can be claimed as two sessions. But remember we expect some balancing of unders-and-overs (*BFC Services Guidelines* page 27).

For further guidance refer to the sessions chart in the *Guidelines* (page 41).

*Have all the regions been allocated their new MSD Contract Management staff to take over from the PFO advisers yet?*

MSD is recruiting 14 regionally-based Relationships Managers and each BFC provider will have one assigned to them.

The new managers have various start dates. Most joined on 31 May, but some are coming next month. The intention is that current PFO advisors will introduce new regional Relationship Managers using a 'warm-handshake' meeting.

## **Funding and remuneration**

*Can the current rate of \$170.50 per session be maintained in future?*

We are working through ways we can secure sustainable funding for the sector. But the temporary additional funding that enabled the higher rate ends on 30 June 2022 and the unit rate will become \$118.70. We were able to pay the rate of \$170.50 for two years due to the COVID-19 Response and Recovery Fund (CRRF).

*Can Financial Mentors be funded per FTE?*

This is one of the funding models being considered. However, any of these changes would depend on progress with the work on the 'foundations' as outlined in the May BFC presentation (see slide number 4).

*We need to be able to pay qualified Financial Mentors more. Recent job applicants have had expectations around \$40 per hour. Can a pay scale be published?*

MSD will consider whether it should indicate an expected pay scale for Financial Mentors through its work on sustainable funding for the sector and as part of the funding models being considered. See the two answers above.

*Thank you for your assurance that there will be no F2021 funding claw-backs. Will that apply to F2022 as well?*

In general yes, but the new Relationships Managers will be involved in supporting providers who have not met contracted volumes, and how best to use that funding for quality services.

## **Reporting**

*Will the questionnaire be downloadable so that these can be provided to our boards?*

We have listed the information that we will ask for in Appendix One of the *BFC Services Guidelines* (pages 32 and 36).

We assume this question also refers to the questionnaire that will be the replacement for narrative reporting. We are redesigning how we collect the narrative data so that it is meaningful for MSD; we expect that this data will be meaningful for services as well. We will share this once it's finalised, well before October 2021.

You can also provide information that does not fit in the questionnaire format with your Relationships Manager.

*Can we have a standard Survey Monkey feedback option? The evaluation form needs to be worded better though*

We assume this is related to the other question about the new reporting questionnaire. This questionnaire will use Survey Monkey or a similar product. We expect that these reports will be much simpler to complete than previous years.

*Will we get access to a summary of the raw data sent via the new reporting methods?*

If you would like to request the raw data – yes, we can provide this to you. We will supply a visualisation of the MSD reporting data. This is still being designed and refined.

*We do monthly reporting which goes to our board; can we submit this (either to FinCap or MSD directly) rather than data that FinCap extracts without our knowledge?*

Providers can submit their reporting data using the spreadsheet we'll send out; so long as your data fits within this template, that is all we need.

However, please note that data will flow directly from Client Voices, FinCap won't need to be involved in the extraction.

## **The new Client Outcomes Measurement Tool**

*When can we see the new tool that will replace COMT? What training will be offered?*

Attached to this package, you'll find an invitation to a further Zoom hui for training and discussion of the new tool. The hui dates are in the last week of June.

## **Client Voices**

*Is there a timeframe for when Client Voices will be capable of doing what is needed?*

We are working with FinCap on how we ensure Client Voices is working for services. We don't currently have a time frame for this, and analysis needs to be undertaken to understand what Client Voices needs to do. One of the first steps is ensuring FinCap and MSD have appropriate processes in place to scope and prioritise changes to Client Voices, as the system is used by over 100 BFC services.

MSD is also supporting FinCap with these changes and expects to work closer with BFC services on how Client Voices can best be used.

*Our funding applications ask which specific clients have children. Client Voices also can't adequately reflect our appointment system of interview rooms. We are double handling because we need to run our own reporting sheet to get this info.*

MSD's BFC outcome agreements do not currently require information about specific clients and if they have children.

For any additional data requests or functionality in Client Voices, it will be important to ensure that FinCap and MSD have appropriate processes in place to scope and prioritise changes to Client Voices.