## Organization Information:

### Our History

In 1979, on the 75th anniversary of the Missionary Oblate congregation, the Sisters opened the Aulneau Renewal Centre on the 4th floor of their Mother House in response to the growing need for psychological and spiritual counselling. What began as a labour of love and dedication to empowerment, growth, and spiritual life, grew into a recognized service provider to the people of Manitoba.

### Our Organization

The Aulneau Renewal Centre is a registered bilingual not-for-profit organization located at 228 Hamel Ave in St. Boniface, Winnipeg. It was founded in 1979 as a mission of the Missionary Oblate Sisters of St. Boniface. In 1998, the organization was separately incorporated as a non-for-profit charitable organization and in 2012, it became a Sponsored Community of Service reporting to the Catholic Health Corporation of Manitoba.

### Mission

The mission of Aulneau Renewal Centre is to empower personal growth by providing compassionate counselling and therapy services and by building the capacity of attachment-informed practice through training and education.

### Vision

The vision of Aulneau Renewal Centre is to be a Centre-of-Excellence providing attachment-informed counselling, therapy and education to help empower and heal the body, mind and spirit of individuals and families.

### Values

Compassion- We work together to serve others with unconditional acceptance, using a wholistic approach that brings healing and connection.

Healthy Relationships- We believe that healthy relationships grounded in secure attachments are critical to the development of the whole person.

Inclusion- We value all people regardless of race, culture, religion, gender, economic means, orientation, age or ability. We have a commitment to equitable treatment and elimination of discrimination in all its forms at all organizational levels.

Integrity and Accountability - We strive to create a culture of integrity and accountability in our actions and attitudes towards ourselves, our clients, our colleagues, our partners and the organization.

Excellence- We strive to lead and sustain excellence through our commitment to professionalism, and continual development ensuring high standards.

Goals

- ✓ To be a Centre of Excellence and leader in attachment-informed practice
- ✓ To develop strong community partnerships
- ✓ To be financially sustainable
- ✓ To be culturally aware and provide relevant services
- ✓ To enhance organizational wellness
- ✓ To integrate spirituality and meaning

We are served by a volunteer board of 11 members. Students in social work and counselling programs regularly volunteer to help in meeting the demands of our services.

Our services are provided not only in Winnipeg, but also in rural communities such as Steinbach and Winkler. In 2017 we provided almost 7500 client hours of service, an increase from 6700 hours in 2016. The number of hours of service provided to clients paying $10 or less grew from 971 in 2016 to 1388 in 2017.

**Project Description:**

Our objective is to implement an integrated case management solution that will help transform the way our organization engages with clients, works collaboratively, demonstrates outcomes and delivers quality, best practice services. The overarching goal is about providing increased and more timely access to our services by the public.

Currently we use disparate systems to manage the tasks required in the operation of our agency. This results in duplication of data entry into manual and electronic systems that do not communicate with each other, presenting challenges for our limited resources.

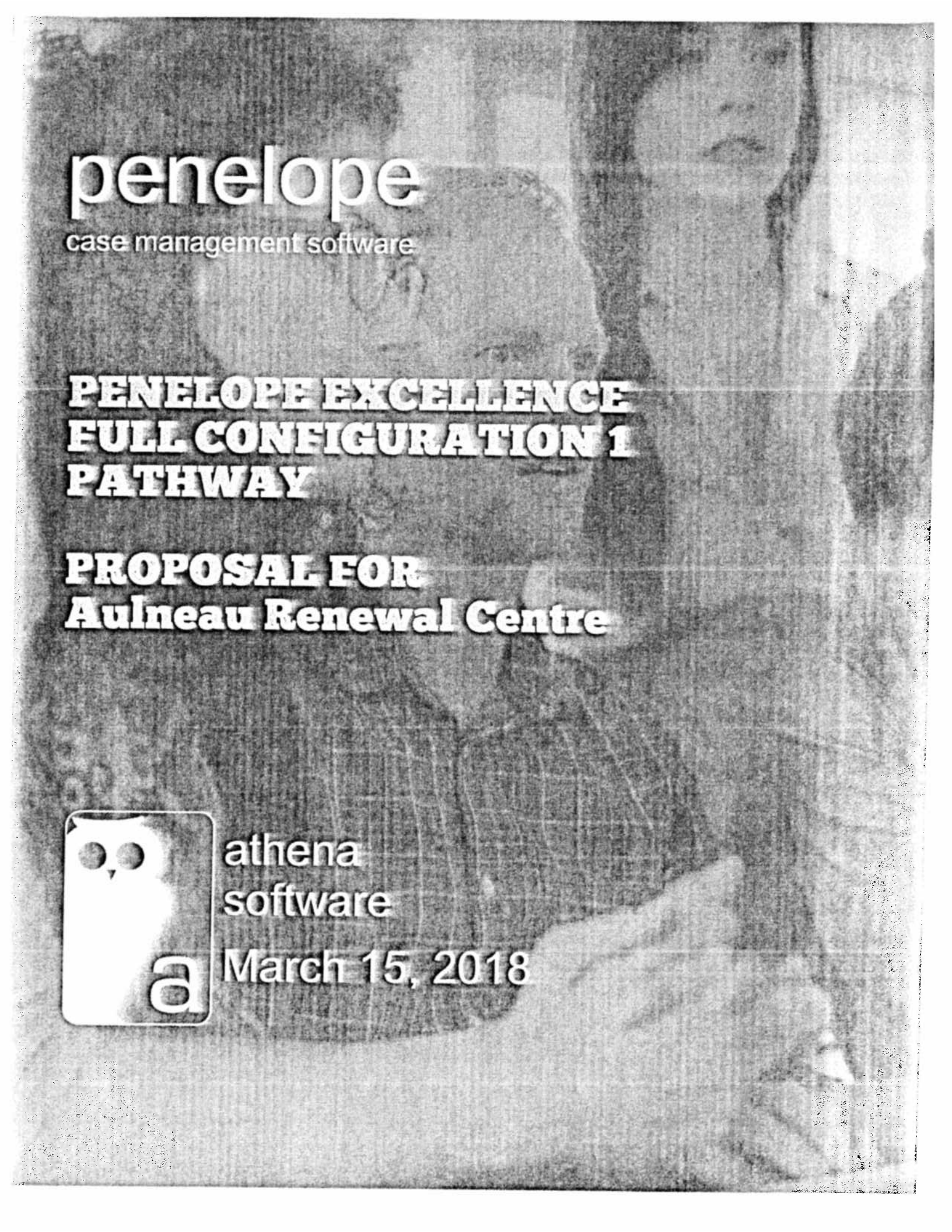
Case Management systems play a profound role in social service enterprises. They are the engine at the heart of the organization. Case Management systems are more than an IT solution. They are integrated project and change management systems that are designed to generate maximum, consistent and sustainable benefits for non-profit organizations. We believe that implementing this system will streamline our operations, provide secure and ready access to client information and provide the necessary data to make sound clinical and business decisions. Furthermore, we feel that this system will enable scarce organizational resources to be better deployed to serve client needs and will cut down on administrative overhead. Ultimately, we wish to meet the overall goal of better fulfilling our mission to provide counselling to any individual, child, or family within the limited resources available to us.

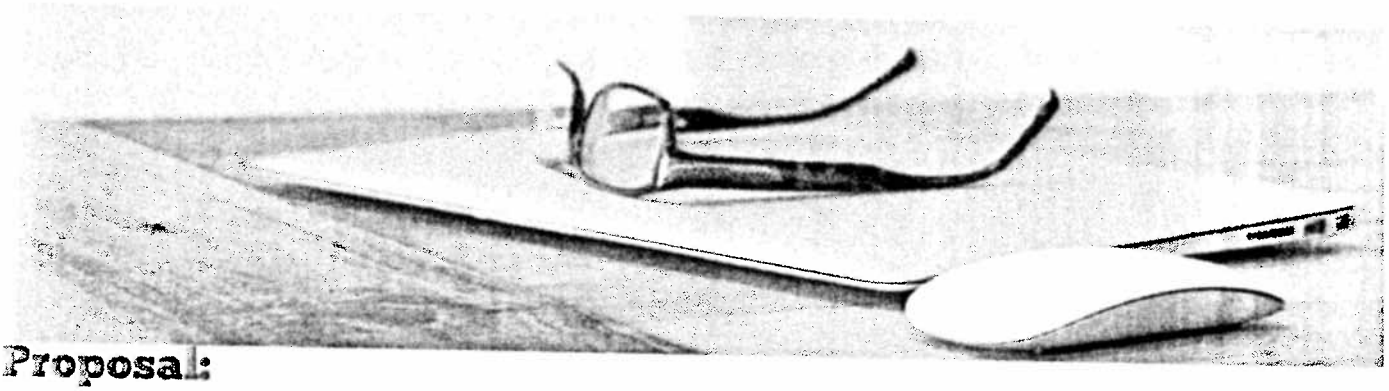
Our ongoing organizational goals are to find ways to better serve our clients. With more people seeking access to affordable counselling services we find ourselves not being able to meet the demand. Reducing longer than acceptable wait lists is an on-going challenge. In addition to lessening our wait times, we would like to provide accurate information about our clients when doing our reporting and assessments. Getting accurate, reliable, and usable data about, whom we are serving, and what we are achieving in terms of positive outcome is part of our ethical standards and commitment as an agency. Tracking and reporting manually is cumbersome, labour intensive, and time-consuming. Preparation of contracts and reports is also labour intensive, time-consuming, and not the best use of our limited financial and human resources. Adopting an integrated case management system will allow us to be able to better measure success, streamline our intake process to one position, and help counsellors manage their time and appointments, which will ultimately allow us to see more clients in a more efficient manner. This will reduce wait times significantly and enable us to turnover contracts faster. Reports will be issued to agencies on a timelier basis which will in turn improve our business relationship with CFS agencies.

The case management system we have identified to meet our needs is called Penelope, developed by Athena Software. https://www.athenasoftware.net/ This system provides a robust feature-set designed to effectively

manage client services with secure mobility, administrative efficiency and quality value-based care. Feature highlights include advanced workflow automation, smart forms, embedded assessments/reports, integrated calendaring, direct client engagement and innovative collaboration tools. Penelope will provide an integrated solution that will address all facets of our business processes, including intake, scheduling, contract management, client notes, reporting, outcome measures and billing. A system will allow us to integrate clinical services, administrative operations, and billing and reporting into one collaborative workforce.

Upon approval of project funding, we hope to begin the implementation process later in 2018, most likely November of December. Our intention is to be running live with the system by March 31, 2019.


penelope
case management software
PENELOPE EXCELLENCE
FULL CONFIGURATION 1
PATHWAY
PROPOSAL FOR
Aulneau Renewal Centre
athena
software
March 15, 2018



**Proposal:**

## Full Configuration Pathway 1.

We recognize the absolutely profound role that Penelope Case Management plays in a social service enterprise - it really is the engine at the heart of your business.

Embedding Penelope into the enterprise is not primarily an IT project but rather a business change project and so it is essential that the deployment is shaped around the impact upon the business and informed by deep industry knowledge.

Athena Software offers a number of different approaches to implementing Penelope Case Management software so that your agency can select the option that best matches your available resources and skills, priorities, timeframes and preferences. We call these different approaches 'Penelope Excellence Pathways'.

Our experienced Penelope Excellence professionals deliver implementation Pathways with a rigor that acknowledges the importance and interdependent nature of both project management and user adoption change management in order to generate maximum, consistent and sustainable benefits for your enterprise.

Based upon preliminary discussions with key staff at your organization, a **Full Configuration Pathway 1** was deemed to be most suitable for your organization given the various factors and preferences expressed.

With Full Configuration Pathways, we work with your organization to understand and document your business requirements and objectives and then perform the configuration work required. There is representative involvement from your team to inform business requirements, undertake testing and support roll -out activities to the broader organization. See Attachment 1 for guidelines on selecting internal resources for the project.

The Full Configuration approach delivers a configured Penelope to the client based on understanding the client requirements. Accordingly, as there are less knowledge transfer

components with these pathways, you may wish to plan for additional Penelope Excellence Services down the track.

The Full Configuration Pathway 1 is led and project managed by your agency with the minimum level of involvement from Athena's deployment services to deliver a quality outcome. It features a relatively low up-front cost and your configuration is fast tracked by experienced and knowledgeable Athena staff. With this Pathway, Athena takes responsibility for system configuration and your agency takes responsibility for the user adoption and training aspects of deployment.

The Penelope Excellence Full Configuration Pathway 1 option includes the following components:

- ✓ PROJECT CHARTER
- ✓ PROJECT PLAN
- ✓ BUSINESS UNDERSTANDING SESSION
- ✓ BUSINESS PROCESS UNDERSTANDING BY SERVICE
- ✓ BASIC PENELOPE CONFIGURATION PER SERVICE INCLUDING SECRUTIY CLASS SETUP
- ✓ INITIAL USER SETUP
- ✓ SYSTEM TESTING AND REFINEMENTS
- ✓ LIMITED PROJECT MANAGEMENT
- ✓ PENELOPE ONLINE LEARNING END USER TRAINING
- ✓ SERVICE MANUAL DEVELOPMENT AND TRAINING
- ✓ WORKING WITH TECHNICAL SUPPORT WORKSHOP

This agency led and project managed Pathway's cost estimate is:

| PEP-FC1 Estimate | Estimated consulting cost | Phased Payment Trigger | Phased Payment Amount |
|---|---|---|---|
| Phase 1 - Mobilize team and initiate project | | | |
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| Phase 2 and 3 - Design and Configure Penelope | | | |
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| Penelope Standard Interface/ Complex Feature configuration | | | |
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| Phase 4 - Test Penelope and Business processes | | | |
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| Phase 5 - Roll-out and Post implementation | | | |
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| Project Management and QA | | | |
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| Base Implementation | $21,760 | | |
| Additional Training | | | |
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| Estimate of Requested Athena Configuration Activities - Estimate only, quote can be provided post Configuration Design) | | | |
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| | | | |
| Total FC1 Estimate based on answers to questions | $33,910 | | $33,910 |

Athena Software staff will be billed by milestone completion and Aulneau Renewal Centre will be invoiced for any travel and accommodation expenses associated with this project should that be requested/required.

The project cost does not include any interfaces, data migration, unique reports, smart document configuration or action trigger configuration by Athena Software which would need to be quoted separately once technical details were available. Once Penelope is selected as your preferred system, Athena Software can create a detailed Project Charter and Plan for your project.

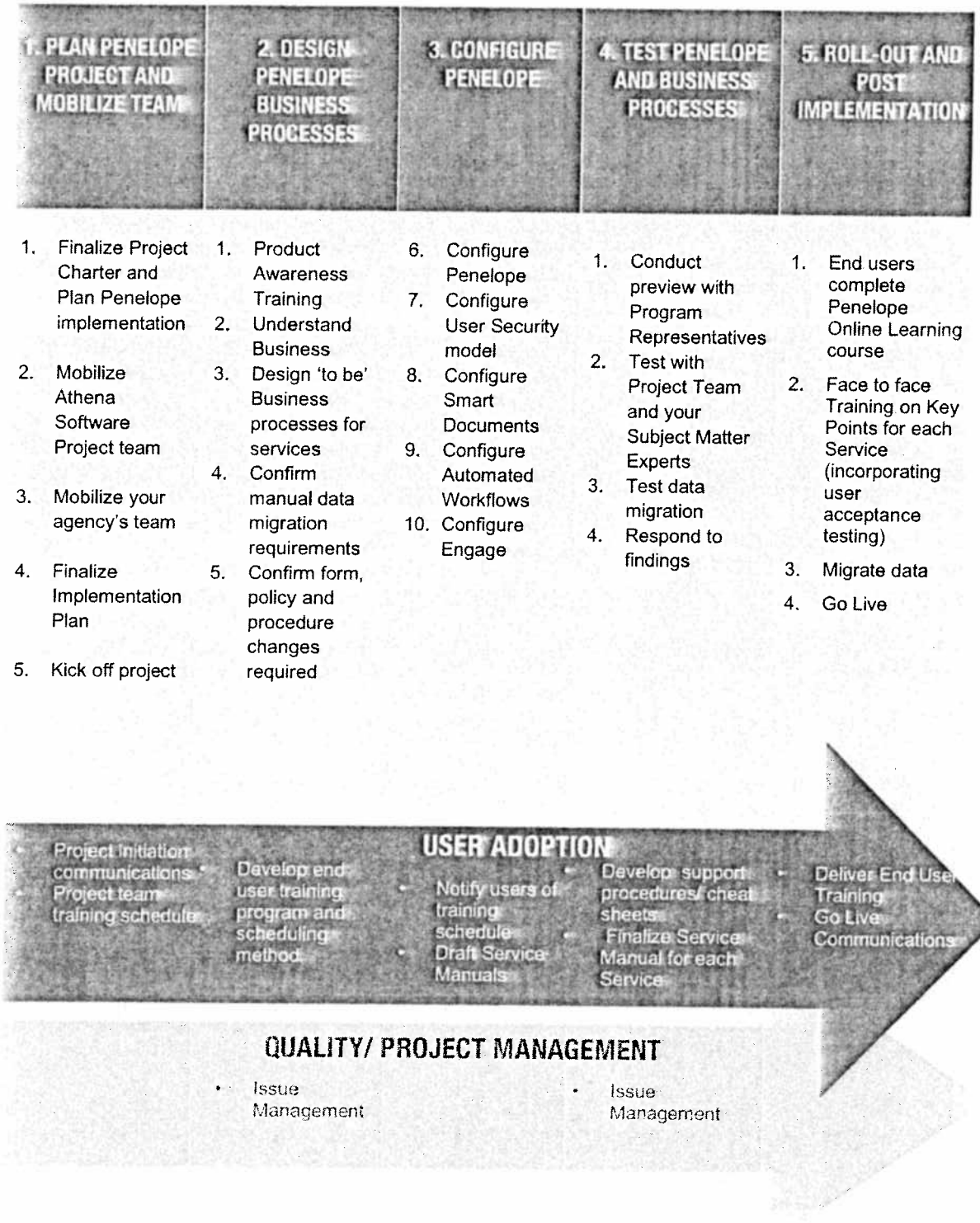
The estimated implementation timeframe is:

**2-3 MONTHS**

Please note that as our services are scheduled on a "first come, first served basis", delays to the commitment date may impact resource availability and therefore the timing of project commencement and go live.

We have also attached a document that provides an overview of the other Pathways so that you aware of the range of services and different offerings we can deliver to help deliver maximum benefit for your organization.

# FC 1 Project Approach



# Attachment 1 - Guidelines to assist with selecting internal staff for the Project

The Client Project Manager/Coordinator is someone who has a strong understanding of the Agency's business and the goals of implementing Penelope within the Agency. They are able to source the required Agency team member for the appropriate stages of the Project. They can manage issues and bring the right resources to bear to resolve project issues and required changes to business policy and procedures. For the term of the project, it is likely that at least 3-40% their time will be required for project management/co-ordination activities in a Full Configuration project.

Client Project Team members may be business analysts or individuals with a high aptitude for business systems in the business. Once again, they will have a good understanding of the Agency's business. They will learn Penelope and influence how Penelope is configured to meet the Agency's requirements. If System Administration training is included in the scope of the project, it is likely that a few Project Team members will continue to be system administrators for the Agency and configure new requirements and services as required. Project team members would spend 30-50% of their time undertaking specified project activities and any homework / follow up activity related to project activities and solving project issues, business policy and procedure issues.

Subject Matter Experts / Service Representatives are people who have a strong understanding of the detailed requirements of a service that will be utilizing Penelope. Commonly this would be from the perspective of administration/reception, intake, service delivery, service management and service reporting. Their knowledge and input will be required for specific scheduled activities within the project which are typically no more than a day at a time. Conservatively, one could schedule approximately 5 days of effort for a Subject Matter Expert / Service Representative over the term of the project.



# Aulneau Renewal Centre

GoldCare Proposal

February 2018

For the changing face of care

GOLDCARE

## Contents

Budgetary Pricing Proposal ..... 3

Proposed Solution – 12 Concurrent Users ..... 3

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# Budgetary Pricing Proposal

GoldCare is pleased to provide this pricing proposal to Aulneau Renewal Centre. This document was compiled from discussions in the third quarter of 2017 and January / February of 2018. Additional discussions may change the following numbers slightly however we believe that this is the following is a good representation of the final costs. We look forward to discussing these numbers with you in the coming days.

## Proposed Solution – 12 Concurrent Users

- GoldCare Home and Community Care Manager –12 concurrent users
  - Prospect CRM Workflow
  - Proposals / Contract Management
  - Schedule Services
  - Email Appointment Reminders
  - Accounts Receivables
- Includes a core of 281 hours of Professional Services
- Includes a Contingency Fund of 70 hours

**One-time cost: $87,200**

- Software: $12,000
- GL export to Quickbooks $5,000
- Core Services: $56,200
- Contingency Fund: $14,000

**Annual ongoing costs: $4,088.04**

- Annual GoldCare Software support and maintenance: $4,088.04
  - GoldCare Home and Community Care Manager: $4,088.04 (Based on 12 concurrent users)

**Notes to Pricing**

1. SOFTWARE

All pricing is based on Aulneau joining the St. Amant / Catholic Health Corporation instance of GoldCare hosted at St. Amant.

Current cost of additional licenses:

Additional Home and Community Care Manager $1,000 one-time per concurrent database license. Incremental annual GoldCare maintenance is currently $340.67 per concurrent.

2. PROFESSIONAL SERVICES

The current GoldCare hourly rate for services is $200 per hour. Additional services will be charged at the then current rate.

A 70-hour segment of professional services is allocated to a contingency fund. This contingency fund is to be used at the Customer's discretion towards unforeseen desired software enhancements and/or customization of workspaces, assessments, forms, reports, etc.

Pricing for training is based on a train the trainer approach.

## 3. MISCELLANEOUS

- Applicable taxes are not included in this pricing.
- All annual costs listed are incremental costs to Catholic Health Corporation Master Agreement. Actual annual fees will be provided by the Catholic Health Corporation and will likely represent a blended rate based on total cost and total users.
- Travel and living expenses are not included.