

***Note to Applicant: below is a sample Schedule A that reflects the project objective, project description, milestones, deliverables and reporting requirements. The schedule A is a piece of the CEP Shared Cost Agreement. To view the complete CEP Shared Cost Agreement sample, please refer to the “CEP Shared Cost Agreement Sample” for the applicable funding stream on the WorkBC website.**

SCHEDULE A- R&I SAMPLE

TERM

1. The term of this Agreement commences on February 1, 2020 and ends on January 31, 2023 and the Project Holder will carry out the Project during the period commencing on February 1, 2020 and ending on January 31, 2023 (the “Project Period”).

INTERPRETATION AND DEFINITIONS

{If Schedule requires definition of terms}

2. In this Schedule:

- a) “Term 1” means...;
- b) “Term 2” means...; and
- c) “Term 3” means....

{If Schedule does NOT require definition(s) of terms}

2. N/A

PROJECT OBJECTIVE

3. During the Project Period the Project Holder will:

test an approach that uses ABC Therapy in addition to the existing 123 services to individuals with severe mental illness. The primary purpose of the study is to test whether ABC in conjunction with the current 123 program, will improve employment outcomes (competencies, frequency of work and change in earnings) for individuals with severe mental illness.

PROJECT DESCRIPTION/INPUTS

4. During the Project Period the Project Holder will:

- a) Hire one (1) Psychologist to provide ABC & research coordination, two (2) 123 staff (Occupational Therapist and/or Vocational Therapist) and two (2) Research Assistants (RA);
- b) Obtain ethical approval for the Project from an ethics review board;
- c) Engage with the Mental Health and Substance Use Centres to advise them about the Project, Participant referral procedures and Project acceptance criteria;
- d) Recruit a minimum of 120 participants from eight (8) Health Centres;
- e) provide each Participant with a project overview and a health and safety orientation in accordance with the attached Appendix A1, section 5;

****If project involves a work experience include the details below ****

- i. provide participants with a Young or New Workers safety orientation and training that meets the requirements of [Sections 3.22 – 3.25 of the Occupational Health and Safety Regulation, B.C. Reg. 296/97](#);
 - ii. submit documentation to the Ministry confirming dates of training, participant initials and completion of Young or New Workers Orientation that meets all requirements;
- f) Randomly assign research participants to either the treatment (cognitive remediation) or control group (n=60 each). Randomization will be done in groups of four: two research participants assigned to cognitive remediation and two research participants to the control (treatment-as-usual) group;
- g) Provide ABC Therapy to 50% of research participants;
- h) Conduct baseline, post-treatment and follow-up assessments. Follow-up assessments will include assessment of symptoms, employment, quality of life;
- i) Include information about provisional client outcomes on the quarterly activity reports;
- j) Conduct quality control checks for cognitive assessments;
- k) Assess fidelity of 123 services provided to research participants in both the ABC treatment and control groups;
- l) Assess predictors of employment success and the cost-effectiveness of ABC Therapy on individuals with severe mental health issues;

- m) Describe the impact of ABC on competencies, frequency of work opportunities and earnings;
- n) Submit a final report to Health Board and ELMSD describing results and, if appropriate, broader implementation.

PROJECT MILESTONES

5. The Project Holder will meet the following milestones:

a) By March 31, 2020:

- i. Hired the Psychologist to provide ABC & research coordination;
- ii. Hired 2 123 staff (Occupational Therapist and/or Vocational Therapist);
- iii. Hired the 2 Research Assistants (RA);
- iv. Obtain ethical approval for the Project from an independent ethics review board;
- v. Begun recruitment of research participants;
- vi. Provided each Participant with a project overview and a health and safety orientation in accordance with the attached Appendix A1, section 5;
- vii. submitted documentation to the Ministry confirming dates of training, participant initials and completion of Young or New Workers Orientation that meets all requirements;
- viii. Begun providing ABC to 50% of research participants recruited to date (n=7);
- ix. Set up the project database;
- x. Received Research Ethics Approval for the study;
- xi. Engaged statistician to review measures, hypotheses, and plans for statistical analyses;
- xii. Trained the Research Assistants on administration of cognitive measures.

b) By June 30, 2020:

- i. Continued recruitment and baseline assessments;
- ii. Provided each Participant with a project overview and a health and safety orientation in accordance with the attached Appendix A1, section 5;
- iii. submitted documentation to the Ministry confirming dates of training, participant initials and completion of Young or New Workers Orientation that meets all requirements;
- iv. Continued providing ABC to 50% of research participants recruited to date);
- v. Begun the post-treatment assessment (3-month);
- vi. Conducted quality-control checks of RA's baseline cognitive assessments;
- vii. Included information about provisional client outcomes on the quarterly activity report.

c) By September 30:

- i. Continued recruitment and baseline assessments;

- ii. Provided each Participant with a project overview and a health and safety orientation in accordance with the attached Appendix A1, section 5;
- iii. submitted documentation to the Ministry confirming dates of training, participant initials and completion of Young or New Workers Orientation that meets all requirements;
- iv. Continued providing ABC to 50% of research participants recruited to date;
- v. Continued the post-treatment (3-month) assessments;
- vi. Conducted quality-control checks of assessments;
- vii. Included information about provisional client outcomes on the quarterly activity report.

d) By December 31, 2020:

- i. Continued recruitment and baseline assessments;
- ii. Provided each Participant with a project overview and a health and safety orientation in accordance with the attached Appendix A1, section 5;
- iii. submitted documentation to the Ministry confirming dates of training, participant initials and completion of Young or New Workers Orientation that meets all requirements;
- iv. Continued providing ABC to 50% of research participants recruited to date;
- v. Continued post-treatment (3-month) assessments;
- vi. Begun the follow-up assessments (9-month);
- vii. Conducted quality-control checks of cognitive assessments;
- viii. Brought on fidelity assessor who will review implementation of 123 program;
- ix. Included information about provisional client outcomes on the quarterly activity report.

e) By March 31, 2021:

- i. Continued the assessments at baseline, post-treatment (3-month) & follow-up (9-month);
- ii. Continued providing ABC to 50% of research participants recruited to date;
- iii. Conducted quality-control checks of assessments;
- iv. Incorporated any process changes revealed by fidelity audit;
- v. Included information about provisional client outcomes on the quarterly activity report.

f) By June 30, 2021:

- i. Continued assessments at baseline, post-treatment (3-month) and follow-up (9-month);
- ii. Continued providing ABC to 50% of research participants recruited to date;
- iii. Conducted quality-control checks of cognitive assessments;
- iv. Included information about provisional client outcomes on the quarterly activity report.

- g) By September 30, 2021
 - i. Continued assessments at baseline, post-treatment (3-month), and follow-up (9-month);
 - ii. Continued providing ABC to 50% of research participants recruited to date;
 - iii. Conducted quality-control checks of cognitive assessments;
 - iv. Included information about provisional client outcomes on the quarterly activity report.

- h) By December 31, 2021:
 - i. Continued assessments at baseline, post-treatment (3-month), and follow-up (9-month);
 - ii. Continued providing ABC to 50% of research participants recruited to date (n=8);
 - iii. Conducted quality-control checks of cognitive assessments;
 - iv. Had fidelity assessor return to review processes as per fidelity guidelines'
 - v. Included information about provisional client outcomes on the quarterly activity report.

- i) By March 31, 2022:
 - i. Completed all participant recruitment and baseline assessments for the project;
 - ii. Completed all participant assignment to cognitive remediation or control group;
 - iii. Continued providing ABC to 50% of research participants recruited to date;
 - iv. Continued post-treatment (3-month) and follow-up (9-month) assessments;
 - v. Conducted quality-control checks of cognitive assessments'
 - vi. Included information about provisional client outcomes on the quarterly activity report.

- j) By June 30, 2022
 - i. Continued conducting follow-up (9-month) assessments with participants;
 - ii. Completed the post-treatment (3-month) assessments with participants;
 - iii. Completed all ABC to 50% of research participants;
 - iv. Conducted quality-control checks of cognitive assessments;
 - v. Included information about provisional client outcomes on the quarterly activity report.

- k) By September 30, 2022
 - i. Continued conducting follow-up (9-month) assessments;
 - ii. Conducted the final quality-control checks of cognitive assessments;
 - iii. Included information about provisional client outcomes on the quarterly activity report.

- l) By December 31, 2022
 - i. Completed follow-up (9-month) assessments;

- ii. Completed clinical documentation using the Health electronic chart (shredding any hard copies of clinical notes that remain);
- iii. Initiated the client close-out processes once research participants complete the 9-month follow-up interview, e.g. review clinical and research documentation with Coordinator and Research Project investigators, respectively, and close the clinical chart;
- iv. Concluded collaboration with the first 123 staff as his/her caseload diminishes, after transferring the remaining few research participants to the second 123 worker;
- v. Prepared research documents for archival storage;
- vi. Consulted the statistician regarding preliminary analysis and begun structuring final reports;
- vii. Collaborated with statistician on final report.

m) By January 31, 2023

- i. Completed all cognitive remediation & employment-support (123) services to the last research participants;
- ii. Conclude collaboration with the second 123 staff, who would have completed the clinical close-out processes as above;
- iii. Submitted a final report to Health Board and ELMSD regarding broader implementation;
- iv. Continued work on papers for publication and conference presentations

PROJECT DELIVERABLES/EXPECTED RESULTS/ OUTCOMES

6. The Project Holder will produce the following deliverables or results by January 31, 2023:

- i. Complete testing of ABC as per project milestones and assess the effectiveness of the intervention on employment outcomes (competencies, frequency of work and earnings) for the project research participants;
- ii. Assess predictors of employment success and the cost-effectiveness of ABC on individuals with severe mental health issues.
- iii. Submit the project Final Report with an executive summary and recommendations for broader implementation.

REPORTING REQUIREMENTS

7. The Project Holder will report to the Province respecting the Project as follows:

- (a) With each claim for payment submitted to the Province in accordance with Schedule B, section 22 (a) the Project Holder will submit a corresponding activity report that summarizes the Project Holder's performance of the Project activities described in section 4 and the milestones described in section 5, including an explanation and action plan to remediate any performance shortcomings to ensure the deliverables or results listed in section 6 will be achieved; and

- (b) With the final claim for payment submitted to the Province in accordance with Schedule B, section 22 (b) the Project Holder will submit a final Project activity report that summarizes each deliverable or result described in section 6, including an explanation and recommendation for any performance shortcomings.
- 8. The Project Holder will provide a response to any Project performance evaluation report received from the Province.

ADDITIONAL TERMS

- 9. Any additional terms set out in the attached Appendix A1 apply to this Schedule.