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Summary of the Evaluation of the Generic Terms and Conditions Pilot Program

From: [Treasury Board of Canada Secretariat](#)

Program description

The Generic Terms and Conditions Pilot Program (the Generics) is a five-year pilot program launched in April 2017. It enabled departments to use innovative, responsive and results-focused approaches to design and administer transfer payment programs.

Methodology and scope

The evaluation was conducted between April 2021 through January 2022 for the period of April 2017 to September 2021.

Methods included a document review, administrative data review, interviews with representatives from 16 departments and the Treasury Board of Canada Secretariat, case studies and a survey of departments.

The scope included departments with a transfer payment budget in the Main Estimates of fiscal year 2019–20. It looked at the immediate outcomes and the assumptions outlined in the logic model as conditions for the achievement of the intermediate and long-term outcomes.

Questions and findings

Question 1: Did departments use the Generics more frequently?

Finding: The number of departments using the Generics was largely static. Most who did use the Generics did so early in the pilot.

Question 2: Did the Generics give departments more flexibility to design and deliver transfer payments?

Finding: The Generics did provide departments with more flexibility to design and deliver transfer payments. Room for improvement remains.

Question 3: Did the Generics enable more efficient implementation of programs in departments?

Finding: More efficient implementation of programs did not occur in most cases.

Question 4: Did federal programs reach a broader range of recipients and collaborators?

Finding: Some transfer payment programs did reach a broader range of eligible recipients and collaborators than would otherwise have been possible.

Question 5: Did this innovation in transfer payment programs deliver benefits for Canadians?

Finding: Though the Generics does contribute to the achievement of program objectives, it is too early to determine the full impact of the Generics on individual transfer payment program outcomes as it relates to providing benefits to Canadians.

Question 6: Did the conditions for implementation success exist?

Finding: The conditions for implementing the Generics were not optimal. Departments identified some barriers and challenges preventing use and limiting uptake.

Conclusions

- The Generics achieved the intended outcomes only to some extent, but it was well received.
- The program lacked ongoing active support and engagement from the Treasury Board of Canada Secretariat Transfer Payment Policy Centre (policy centre) due in part to a lack of resources devoted to supporting departments.
 - The shift from traditional transfer payment models to those offered by the Generics requires significant effort.
 - Capitalizing on the Generics requires departments to build knowledge and expertise, as well as adapt systems. While the policy centre did provide departments with an extensive guide and workshops at the outset, it did not have the capacity to sustain this support.
- The policy centre was not able to make changes in response to departmental feedback that might have resulted in greater uptake during the pilot.
- The pre-defined end date was a barrier to success as there was an increasing possibility that the authorities being piloted would expire before project completion.
- The Generics favoured departments and projects that could either launch early in the pilot's life cycle or be fully implemented quickly.
- Though the adoption of the Generics was low, departments were interested in using new and innovative approaches.

Recommendations

To strengthen the Generics, the evaluation recommends that the Office of the Comptroller General:

1. establish the Generics as a transfer payment instrument for departments on an ongoing basis
2. increase the Office's capacity (skills and resources) to:
 - play a more effective role in supporting departments' use of the Generics
 - incorporate the feedback provided by departments for possible improvements
 - regularly update and make available the Generic Terms and Conditions: A Guide for Practitioners
 - improve performance measurement and reporting
3. strengthen its role in the transfer payment community by facilitating greater communication within the community, especially between departments who have used the Generics and those that are considering the Generics
4. consult with partners, such as the Privy Council Office's Impact Canada Initiative, to coordinate the Generics with parallel initiatives and improve government-wide access to innovative transfer payment approaches as well as the ability to implement such approaches

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