Innovative workforce fund
Progress Performance Report

31 October 2017

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Version number	V1.0
Organisation	Avivo: Live Life
Project Name	Working Locally
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Reflecting on implementation and early outcomes

Even though your project will be at an early stage, please describe what has happened to date in response to the questions below.

a. **Describe which outcomes have been fully or partly met?**

In this first quarter of the project we have made a lot of positive progress and achieved many of the milestones that were set out in our Roadmap to Working Locally, further details are provided in the attached documents *Roadmap Q1 Status Report* and *1.2. WORKING-LOCALLY-ROADMAP-A3-text-only-200817*. Some tasks require more time than planned and will be completed in the next quarter.

We have:

- Formed several working groups to undertake specific Roadmap activities within a specific time period ie. Team Framework, Mapping, Comms & Engagement, Supporting People.
    - **Team Framework:** Developed a Draft Framework and Guidelines document for Local teams that outlines roles and tasks are undertaken by local teams and what is undertaken by others (*please see attached document 4.1 Draft Framework and Guidelines for Local Teams*).
    - **Mapping:** Produced high level map of current customers and employees which can be used to identify potential teams. In addition analysis of existing data has been completed to inform different scenarios of teams. These are valuable tools to explore options and create detailed maps of future teams.
    - **Comms & Engagement:** The working group developed a communication and engagement strategy in consultation with staff across Avivo and particularly support workers. It was determined that staff had a strong preference for face to face conversations, individually and in small groups. These opportunities are being provided across Avivo with Areas and units hosting events for all staff to understand and have input into Working. This is being supported by other communications strategies including:
        - Working Locally and Roadmap Infographic(*please see attached document 1.1 WORKING-LOCALLY-ROADMAP-A3-graphic-200817*)
        - A Working Locally webpage that all employees can access and contribute to discussion groups
        - Regular newsletters and email about Working Locally
        - Confidential feedback forum on our Website for people to provide input without fear of negative consequences
        - Held numerous local events to provide employees and customers with opportunities to discuss working locally.

            Others communications and engagement tactics are being developed as progress with the project and assess what is working.

    - **Supporting People:** A Supporting People Working Group was established to develop a plan on how we consult and support our people (employees and customers) through the transition. Based on advice from employees, the working group focused on defining principles to underpin the transition rather

than documenting a plan. These principles have been developed with input from employees and customers and are currently in draft form. The plan will be developed through the next quarter.

- A plan has been developed by management about the process to consult with employees about the pay and conditions which will then be reflect in the negotiations of the EBA in 2018. This plan is confidential so as not to impact on negotiations.

- Developed a Learning and Evaluation Plan.
  - Developed and completed an Employee Satisfaction and Engagement and Customer Satisfaction and Empowerment surveys with summary results available. (*Please see attached document 171030 Report against Evaluation Framework*)
  - Held Stop and Learn event, reflecting and learning from 16/17 local initiatives. *(Please see attached document 170728 Stop Learn1ReportV4 Final)*
  - A second Stop and Learn event is scheduled for the 8th and 9th November to reflect and learn from the work completed over the last 3 month. The Roadmap content and timelines will be reviewed and reshaped as appropriate and the Activity plan will be revisited.
  - Measures and processes to inform teams of progress have not been put in place yet. This will be completed in the next quarter.

- Established the Roadmap Hub working group to hold the vision of Working Locally, guide the Roadmap implementation and encourage collaboration.

- Continued to progress and support local initiatives of self-directing teams across a range of locations.

b. Have there been any unexpected outcomes or issues?

We are finding that talking about and everyone understanding why we are making the transformation to local self-directing teams is very important for everyone involved. In hindsight this could have been made clearer in the first months of the project.

We are seeing high levels of engagement and interest across Avivo. The process of collectively developing the Roadmap and having working groups undertake tasks is highly effective in engaging and developing people as well as creating better solutions.

The recent staff survey has seen an increase in the volume of returned responses exceeding 50% in comparison to previous staff surveys. This level of response, especially from "community" based roles (74% response rate) has had a positive impact.

Working Groups nearing the end date are not only producing their required deliverable they are also presenting recommendations for next steps, new working groups and offering the continuation of a few members to provide context to the new group who will be responsible for progressing the next stage.

Working Groups have reported challenges with attendance of field based staff due to prioritisation of support. In order to address this we have:

- Increased the volume of invites to field based employees to ensure they have fair

representation across teams.

- Ensured field based staff are given sufficient notice (est. min 3 wks.) so that alternative support arrangements can be put in place to enable them to attend events & participate in Working Groups.

c. Has the project proceeded according to your activity work plan?

Whilst the majority of work has progressed according to the activity plan there is one activity that will be completed next quarter:

- Learning & Evaluation: Put in place measures and processes to inform teams of progress – revised completion date Dec 18

d. Have you changed your program logic and/or evaluation and learning plan?

There have been no changes to the program logic and/or evaluation and learning plan.

Project establishment

How have you have engaged key stakeholders in the design and governance of your project to date. What have you done to engage each group; what is going well and what has not proceeded as planned?

i.   Service users, family or carers

Prior to developing the Roadmap, a workshop was held with our 'experts by experience' (customers who have said they are interested in developing Avivo) about Working Locally and asked for their input and concerns.   Their input provided valuable bottom lines we need to ensure we pay attention to as we progress including:

- Respect existing relationships
- Continue to improve and provide good services
- Communicate
- Don't muck it up

We had numerous customers involved in the two day workshop to develop the Roadmap which ensured we maintained focus on what is important to them. Over the past month we have held several customer events, split in to two parts, the first part is a focussed 2-way conversation about working locally and the second a workshop to support our

enabling through technology workstream. These events have been held at a variety of locations across Perth Metro and Regional areas, and have been highly participative, informative and successful. As a result they will be a regular feature going forward.

Two Avivo customers have been recruited to the Roadmap Hub. The purpose of this group is to hold the vision of Working Locally, guide the Roadmap implementation and use of resources as well as identify issues and gaps. It also has a key role of encouraging collaboration and sharing of information across Avivo. This is a collaborative group of customers and staff.

Recently we invited a sample of 549 customers to take part in the Customer Satisfaction and Empowerment survey. This is the first time we have done such a survey and people could do it by post, on line or by phone. 174 customers responded providing a return rate of 31.7%.

ii.   Workers/potential workers

Achieved good levels of interest and engagement in the Working Groups from employees across the organisation.

Working locally working group representatives have been sharing their experiences with their peers attending team meetings and encouraging each other to volunteer for future working groups. As a result the response to invitations to be part of working groups have been really successful, whilst core members are selected those who were unsuccessful will form part of the wider network for that working group and a called upon as required to support consultation and provide their input and feedback

Teams across the organisation have been encouraging opportunities for informal and formal conversations and engagement. Individuals have been sharing experiences, using various tools to explore and support self-reflection and initiate good conversation (a couple of examples of tools used are noted below). Acknowledging that with change comes a variety of emotions, both positive and negative and that it is OK to sit in the various spaces. There has also been recognition that there are individual opportunities for growth and development and we have started to see some positive outcomes.

The Kübler-Ross change curve
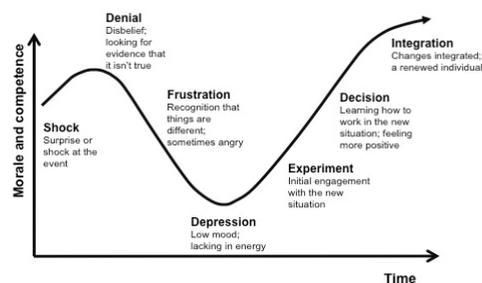
Teams are communicating working locally in a variety of ways, one team has created a working locally wall on which they have used post it notes to raise questions, concerns and to share relevant information. The post it notes have been grouped in to categories and team members are encouraged to visit either in groups or individually to view and review the comments, add their own or offer potential solutions.

Several events have been held to date, these include:

- Staff workshops in partnership with our external partners to support the enabling through technology working group
- Stop and learn event
- For Us, About Us event (planned for early November) targeted at coordination and team facilitator roles

iii. Other stakeholders (Referrers and funders)

Avivo has discussed Working Locally with funders at a high level including the NDIA, WA NDIS and Disability Services, Home and Community Care (HACC) and have their support with the transformation. Further work will be done in the next months to further inform and consult with referrers and funders about working locally at an operational level.

What methods are you using to communicate information about the project to stakeholders?

A Communication and Engagement Strategy is in development to provide structure and consistency in our methods of communication. Currently we are using a variety of methods to communicate information with stakeholders, for example, weekly email updates to all staff, working groups, face to face conversations with staff and customers, web page, newsletter, sharing experiences.

A Working Locally web page has been established, this provides information on events, updates from the various workstreams, working groups via a forum which also enables opportunities for wider discussion. However, it is recognised that traffic to this web page is still relatively low.

Regular conversations are being held with funders and reports being provided on a regular basis about the project, discussing progress and learnings.

What is working well?

Achieved good levels of interest and engagement in the initial Working Groups from employees across the organisation.

Working Groups benefit from having a wider network to draw on when for advice and feedback as they progress with work. Having a social contract in place that everyone had agreed to worked well as it was a point of reference when going off track.

Utilising accessible, collaborative workspace to enable contributions from all.

Creating equality within the working groups by removing job titles from introductions, recognising individual skills and talents outside their traditional role within the organisation. Providing opportunities for growth and development through roles within the working groups, organisers, facilitators, bloggers, etc.

Starting to see some cultural changes, supportive, good quality conversations, and staff stepping forward as leaders.

Proactively seeking and identifying opportunities for change, decision making as a team rather than hierarchy e.g. staff member leaves through natural attrition, opportunity to stop and evaluate within the team to see if there is anything that can be done differently.

What could be improved?

Staying true to the vision of Citizenship, developing an organisation that supports self-direction for everyone and using a collaborative approach is challenging for everyone involved. We tend to fall back in to hierarchical ways of working and make decisions. We are working hard individually and collectively to address underlying assumptions and develop our ability to work in this way.

By intentionally having Working Groups that include more support workers, people in roles such as coordinator or manager have not participated to the same extent. This is challenging people to think about how they contribute and influence the transition. This will be monitored and addressed if continued to be reported.

Due to the diverse memberships within working groups, participants need to be mindful that individuals have differing levels of power, knowledge, experience and background and the Working Group needs to find ways of addressing this.

Team collaboration work spaces (basecamp & Microsoft teams) have been created and actively used by the various working groups, however, traffic and engagement on the Working Locally web page remains low and strategies are being developed to increase relevance and usage.

Currently reviewing reporting channels to improve the way we keep the wider organisation up to date with the work of the groups.

Avivo Roadmap.

	1 month (end Jul 17)	3 months (end Sep 17)	6 months (end Dec 17)	12 months (end Jun 18)	18 months (end Dec 2018)	24 months (end of June 2019)	Outcomes
	Getting Ready		Getting Going		On the way		
PLANNING Planning & Evaluation	Roadmap complete Working Locally steering group in place to oversee project Budget complete	Mechanisms for governance, working groups and coordination of work on Roadmap in place A central collaboration and library space for working groups and teams in place	Basic information to support teams to work and meet compliance requirements available	Budget and financial reports for 2018/19 for Working Locally			Achieved strategic goals: Working Locally, development culture, enabled through technology
	Team Mapping working group established. Mapping started	A map completed showing potential teams across Avivo	**All Community Service regions have detailed map of teams and a transition plan to work locally**				
	Team Framework working group established	**Framework for Local teams agreed** Draft financial model(s) available	**Framework for office based (admin and coordination) teams to support Local teams agreed**	**All office based teams have a transition plan**			A good service provided consistently
	Evaluation methods agreed	Stop and Learn event – focusing on 2016/17 initiatives Measures and processes to inform teams of progress are agreed	Stop and Learn event – for 6 months Refreshed Roadmap	Stop and Learn event – for 12 months Refreshed Roadmap	Stop and Learn event – for 18 months	Evaluate Roadmap	
PEOPLE Our People & Development		**Plan developed to negotiate employee conditions to support Working Locally** **Plan developed to consult and support our employees to transition**	**Individual consultation with field employees complete** Support mechanisms in place for those affected by potential job changes Mechanism in place to identify and support team development and performance **Training and development opportunities available for employees** Community services teams forming Teams equipped and receive critical training as required	**75% of field employees in Local team structure** **Individual consultation with office based employees complete** Office based teams forming	**100% of field employees in Local team structure** **Conditions for all employees in place to support Working Locally** **Office based teams in place to support business**		High customer satisfaction, choice and control Growing customer numbers A good place to work: employees have greater autonomy, development, satisfaction, engagement and lower turnover
COMMS Communication & Engagement	Comms working group established Roadmap shared with all employees showing the path and why Comms & Engagement strategies developed for employees, customers and funders	Local events to discuss Working Locally, Roadmap and what it means for them Here's Cheers event – celebrate and acknowledge work done by all	Here's Cheers event – celebrate and acknowledge work done by all	Here's Cheers event – celebrate and acknowledge work done by all	Here's Cheers event – celebrate and acknowledge work done by all	Here's Cheers event – celebrate and acknowledge work done by all	Funders understand and support us and how we work Avivo financially sustainable and efficient
		Meeting held with Experts by Experience to discuss working locally, the Roadmap and what it means to them and advise on implementation	**Complete individual consultation with all affected customers** Meeting held with Experts by Experience	Meeting held with Experts by Experience	Meeting held with Experts by Experience		
TECH Technology, Systems & Facilities	Enabling through Technology project team in place	**Understand the technology required to work better together** Agreed technology priorities – phased implementation aligned with what needs to be delivered and when Feedback workshops held with employees/customers Confirmed mobile device strategy	Facilities Plan developed – community rooms, office space, technology Ongoing workshops/feedback on technology Technology solution in development – infrastructure, data modelling, security	**New technology available to teams – initial functionality delivered** Teams receive reports on performance	**Teams have mobile technology to communicate and organise work** All functionality delivered		Technology enables our work

Draft Framework for Local Teams

Customer Journey	In	Out – Back Office	Out – Field Support (floating role serving multiple teams) – transition period or permanent.
Meet	• Customer research	Initial general telephone enquiries – main line – establish which team to call	Referral / Registration (refer to decision notes attached)
Plan	• Develop support plans		
Set up	• Recruitment (adverts, interview, interview questions) • Shared Living and Shared Management set up (with support) • Research interests etc • OSH – working safely assessments	• Recruitment (references, police checks, visas, contracts)	• Support initial set up for shared living and shared management
Live Life	• Rostering (inc planned and unplanned leave management) • Team rewards & recognition • Individual customer budget management (once set up) • Direct support (all billable, funder reports, customer meetings, phone calls family/customer) • Customer product purchasing • Stakeholder relationships (networking, case management - with support) • Debt collection – initial conversation • Telephone enquiries – customer roster, changes, queries • Complaints/compliments	• Debt collection – escalation • Complaints/compliments – escalation • Invoicing • IT support	• Support for case management • Support for complex situations • Funding expertise

Customer Journey	In	Out – Back Office	Out – Field Support (floating role serving multiple teams) – transition period or permanent.
	• Incident management • Behaviour support management • Customer notes • Shared living requirements • Shared management requirements		
Review	• Customer conversations • Reviewing funding/budget • Individual customer reporting to funder		• Support review
Move on	• Discharge – conversation to support customer, paperwork, discharge form	• Discharge – financial	

Team Management (functions not directly linked to customer journey)

ALL **IN**!

- Team budget
- Induction / on-boarding new employees
- Office supplies ordering
- Reward & recognition
- Local team promotion
- Group supervision
- Probation reviews
- Development needs identified and budgeted
- Leave cover (and option to access neighbouring teams when needed)
- Extracting/reviewing reports
- Team meetings and attendance at broader conferences / other local team meetings to learn from each other
- Data management – electronic – local (paperless – no filing, scanning, printing)
- Relationship building with local providers (GPs/clinics/psychs/other)
- Quality audits by funders
- Operational planning (with support)
- Monitoring & Managing key performance indicators and management information

Field Support functions

Works across multiple teams to supplement skills, at least for a period

- Referrals and registration (review transition in to local teams later – too complex now)
- Support to set up new teams if required
- Funding expertise/champion
    - Including Qs re whether certain products may be purchased
- Complex situations, difficult customers, escalations/complaints
- Serious incidents and OSH management support
- Support case management, behavioural support
- Evaluations, quality control
- Support the development of strong team relationships
- Support and coaching when teams get stuck – e.g. joint decision-making, conflict management

Back Office / Specialist functions

- Financial part of discharge
- Organisation-wide strategic planning – link to teams
- Escalated debt collection
- Recruitment support – police check, contract, visas etc
- Serious incidents management – OSH / HR
- Avivo-wide branding/marketing
- HR personal issues / escalations in supervision/appraisals
- Training/development – group bookings
- IT support
- Avivo-wide meetings / multi-team cluster meetings
- Processing and paying invoices / receiving payments
- Plan management where we don't provide direct support – purely admin
- Legal compliance
- Payroll
- Organisation wide HR functions like EBA negotiations
- External financial reporting
- External contract management (providers, lessors)
- Funder acquittals / ACDC
- Organisation wide scorecard/OSH/management reporting
- Consolidated management reporting – central
- Nurse consultant training
- Behaviour support planning
- Support/facilitate operational planning

Registrations – decision notes – why OUT (for now – roll out in phase 2)

- Each team wouldn't do it often enough to get competent

- Some elements could be IN but this would mean different fingers in the pie and an inefficient process

- Enough to do in first 12 months. Enough changes with transitioning the simpler functions into local teams

- Wait for funding models to settle (WANDIS & NDIS)

- Funders are new too and make mistakes – we need knowledge at registration point to pick up on these

- Technology improvements - phase in easier functions first

- This is our income – too risky for us and for the customer

- Scary – at least for now – let teams form and incorporate other areas – build confidence and work on building funder knowledge first

- Need to significantly improve process and systems first so that when it is IN, it is simpler

- Start building funder knowledge now in preparation – self-select to build skills, so that there will be at least 2 who are very strong in each team when it transitions.

- Training and skill development can come from sitting in on rego meetings – a certain number of paid shifts per person. Also serves as intro between customer and a member of the local team.

- SWs want to know about funding but not be responsible for setting up! Introduce softly

Guidelines for local teams

- Paperless
  - Scanning software
- Casual pool of SWs to assist with leave
- Team size
  - Min 3 (to ensure breadth to cover all functions)
  - Max 10 (branch out with growth by growing team in short term to transfer 1-2 people into new team (help start up))
- If SW or customer moves – gradual transition to new SW in local area
- Avivo does not pay for travel to team location – exception for regional - try to secure in funding
- Saying 'no' – eg unsafe to support
  - Social contract "find a way"
  - Get support (floating role / back office)
  - Refer on where necessary
- Functions that team members don't want to do
  - Generally aim to minimise due to leave cover implications
  - Negotiate / compromise / agree as a team
  - Rotate
  - Upskill
  - Adjust hours
  - Consider pay rate
- Target % billable hours – TBC – team must work to it
  - 6 months allowance to build up to target
- Social contract – all new teams (revisit as needed)
- Team meetings as needed and as budget allows / dependent on issues / customer complexity
- Small leased rooms for up to five teams to use
  - Meetings / quiet work
  - Own housekeeping
  - Stock supplies
  - Monitor & keyboard available
  - Hotspot to phones
- Teams to utilise and follow Avivo processes

- o Advice process for Decision making
- o Conflict management
- o Recruitment
- o Performance management
- When recruiting, seek only workers available for a minimum number of hours, to ensure majority of team can support leave cover

Person Centred Teams

Initial thoughts:

- SW to work on a maximum of 3 person centred teams

- Unsure whether appropriate to also be part of a local team. SWs need the 'light & shade' – to balance the complexity and intensity of high care, with simpler care options, but what about pay rates if they work from high to low care?

- Need a clear definition of a person centred team – might differ to current definition??
  - Hours / funding / complexity / capacity building – all determine need for a person centred team

Notes to get moving

- We recommend the proposed framework is trialled, to the extent possible, in 2 or 3 teams, asap
- Big IN – ASAP!
  - o Rostering
  - o Writing support plans (need training)
  - o Local team meetings rather than cluster
- Training/upskilling critical – start ASAP. Prioritise topics.

Working Locally.

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Where do you find yourself on the Working Locally Roadmap?

Much like shopping centre maps that comfortingly remind us 'You Are Here' when we can't find the bathroom, our Working Locally Roadmap has been designed with reassurance in mind.

It's main purpose is to help us work out where we are, as well as what's happening and when. The highlighted milestones were chosen by groups of employees and customers as indicators of our progress.

As we embark on this two year adventure together it is anticipated that, from time to time, the Roadmap will evolve. Use it as your reference point when talking to team members, to see where we're up to at any given time, and to keep an eye out for any exciting updates.

The back page includes a legend that helps decipher the icons on the Roadmap, and a list of some of the FAQs from across the organisation.

Shaping the future Avivo with better outcomes.

THE STREAMS
For Working Locally to succeed activities were grouped in to four streams

PLANNING
How do we organise our teams to work better together with customers?

PEOPLE
How are we supporting our people for Working Locally?

COMMS
How are we keeping everyone in the loop?

TECH
What systems are needed to help us work better together?

THE ICONS
Within these four streams will be working groups and cross-collaboration

STOP AND LEARN

Stop and Learn
Getting together to share what we've been working on.

HERE'S CHEERS

Here's Cheers
Getting together to celebrate the work we've been doing.

FAQs

There's questions being asked about this project and some are listed here. As we continue along the road, no doubt there will be more. Here's a few to start:

Will I only be able to support customers that live in my local area?
Right now teams are mapping where people live. We want to develop two types of teams: Local teams and Personal teams. Having people living close to where they work is desirable but might not always be possible for a number of reasons such as important relationships and the skills of the team. Before any changes to teams are made, customers and employees will be consulted and we'll work together to figure out what's best for everyone.

Is it likely that roles will change as a result of Working Locally?
There will be changes to some jobs and the different roles within them. Once we agree the roles and tasks the Local and Personal teams take, we'll work out what is required to support them.

Will this result in people losing their jobs?
We want as many people as possible to continue to work for Avivo. Once we

understand the changes to jobs, there'll be opportunities for you to develop knowledge and skills. We'll make sure that as we progress along the Roadmap, we will work together to ensure the best outcomes for you.

How different is Working Locally from how I work now?
If you support customers to live life how they choose as a part of a supportive connected team, then not much. If you currently work in isolation you will become part of a team that supports customers to live in their community.
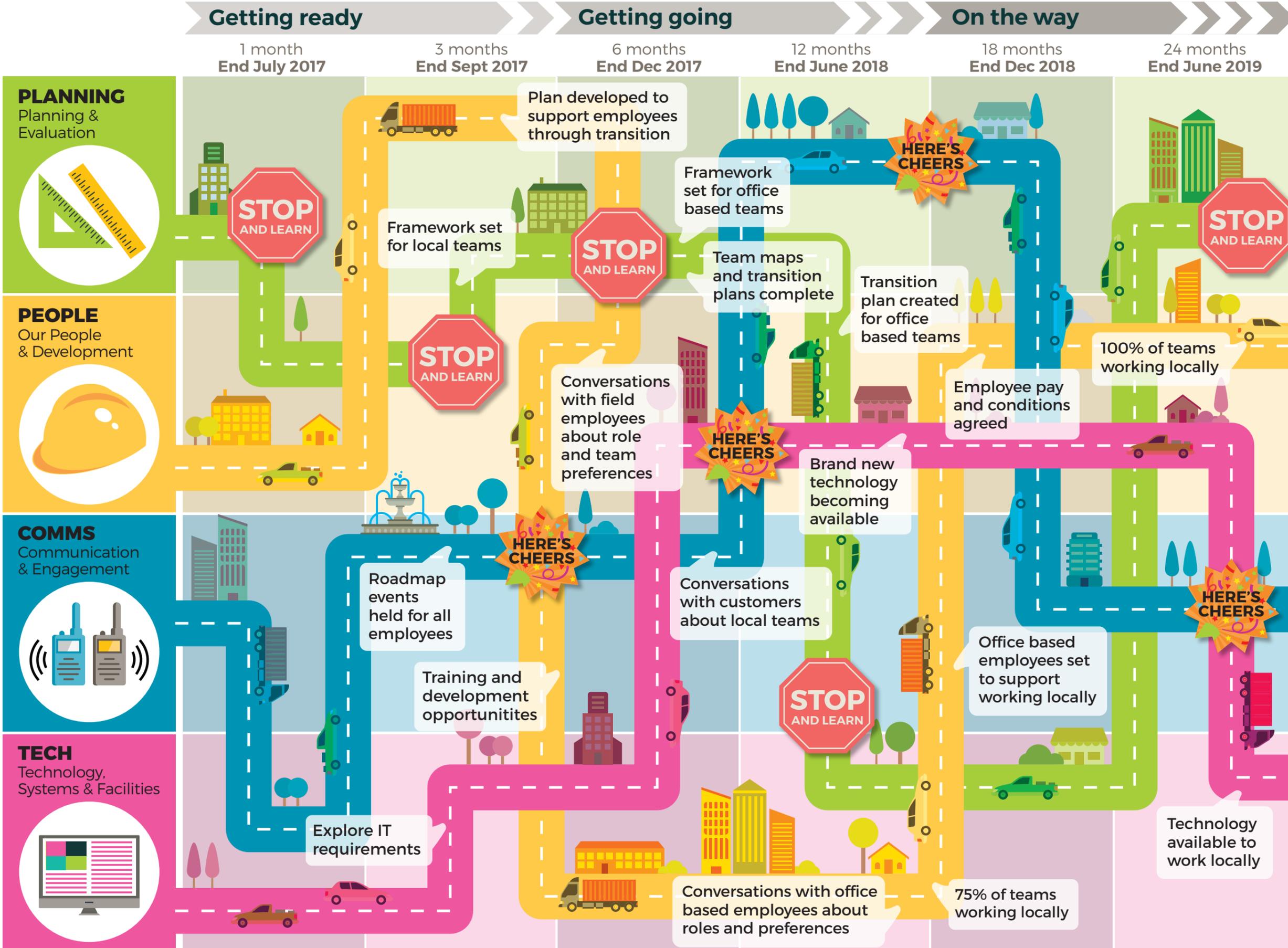
What do I tell customers?
Right now we don't know which customers will be affected and some may have no changes at all. Please reassure your customers that they'll be consulted about their preferences before any changes are made, and that we're developing local teams to benefit ALL of our Avivo customers.

Head to http://staff.avivo.org.au/ to ask questions and share your thoughts.

Avivo Roadmap.

Planning the journey towards doing better what we do now

Working Locally.
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Getting ready | **Getting going** | **On the way**

| 1 month End July 2017 | 3 months End Sept 2017 | 6 months End Dec 2017 | 12 months End June 2018 | 18 months End Dec 2018 | 24 months End June 2019 |

PLANNING
Planning & Evaluation

PEOPLE
Our People & Development

COMMS
Communication & Engagement

TECH
Technology, Systems & Facilities

STOP AND LEARN

STOP AND LEARN

STOP AND LEARN

STOP AND LEARN

STOP AND LEARN

HERE'S CHEERS

HERE'S CHEERS

HERE'S CHEERS

HERE'S CHEERS

Plan developed to support employees through transition

Framework set for local teams

Framework set for office based teams

Team maps and transition plans complete

Transition plan created for office based teams

100% of teams working locally

Conversations with field employees about role and team preferences

Employee pay and conditions agreed

Roadmap events held for all employees

Brand new technology becoming available

Training and development opportunitites

Conversations with customers about local teams

Office based employees set to support working locally

Explore IT requirements

Conversations with office based employees about roles and preferences

75% of teams working locally

Technology available to work locally

Shaping the future Avivo with better outcomes in:

Customer service, choice and control

★

Employee involvement and decision making

★

Technology

★

Financial sustainability

★

Connections between people and communities

♥

Evaluation Framework – Employee Engagement and Satisfaction

Project Outcome	Outcome Indicator/ Survey question	Success Criteria (Based on Agree & Strongly Agree %)			Results October 2017
		2016 Survey	**2017 Target**	**2017 Actual**	
1.1 Avivo wide engagement – Extent & satisfaction	**Communication about the changes** • I receive information from Avivo in a way that works for me	67%	75%	**76%**	A total of 657 responses received from final survey distribution to 1192 = **55.1% return rate.** People in "Community" roles contributed 74% of responses. Communication was highly rated (i.e. average rating greater than 4 out of 5) by Coral Coast, Western Beaches and Northern Beaches.
	Employee Engagement Staff Engagement Scale comprising 9 questions and measuring commitment, enthusiasm and focus			**60%**	Well over half (i.e. 60%) reported feelings of engagement a few times a week, if not daily. 3% reported feelings of engagement to occur a few times a year or less. P&C Direct (72%), South East (70%) and Coral Coast (69%) displayed the highest levels of engagement. The engagement scores ranged from 50% to 72% for all regions.
1.2 Increase in team members who feel their efforts are recognised and valued	**Recognition or praise for good work** • Over the last month I have received recognition or praise for my work	66%	75%	**58%**	All average scores for recognition were between 3.42 and 3.89 on a 5 point scale with the exception of Fremantle (2.97).
	Your opinion counts • At work my opinion seems to count	73%	80%	**65%**	Highly rated by Coral Coast, P&C Direct and Perth Hills.
	Appreciation of the skills & experience you have • The skill & experience I bring to work is appreciated	75%	80%	**74%**	Coral Coast, P&C Direct, Perth Hills and P&C Support rated appreciation as high.

1.3 Increased levels of team member autonomy	**Team Member Autonomy & Decisions** • I have the opportunity to be involved in decisions at work			**64%**	This question was not included in previous surveys. Coral Coast and P&C Direct rated autonomy as high.
1.4 Teams have appropriate skills, knowledge and confidence to adopt to change	**Training and Resources to do your Job** • I have the resources (i.e. technology & information) to do my job well • I have the training and support to do my job well	83%	88%	**70%** **74%**	Coral Coast displayed a high rating for having appropriate resources. Training and support had high ratings from Coral Coast, Northern Beaches and Western Beaches.
1.5 Teams feel they have been supported to adapt to change	**Are you Supported?** • I have the support I need to develop			**63%**	This question was not included in previous surveys. Coral Coast rated support as high.

Evaluation Framework – Customer Satisfaction and Empowerment

Project Outcome	Outcome Indicator/ Survey question	Results October 2017
2.1 Customer, family and carer engagement – extent and satisfaction	How happy are you with the communication between you and Avivo? (Rating 1-10) Do Avivo staff (yes or no): • Talk to you about what you want? • Talk to you about how they can help? • Let you know how your funding or hours are tracking? • Listen to you if you have a concern or complaint?	A total of 174 responses received - 14 from trial survey plus 160 responses (2 telephone, 125 postal, 33 online) - from final survey distribution to 549 = **31.7% return rate.** Response size for each region ranges from 9 (Coral Coast and Wheatbelt) to 25 (South East Ranges). On average customers rate Avivo an 8 out of 10 for satisfaction with communication. Average ratings for each region ranged from 6.67 to 9.25. Most satisfied customers were from Wheatbelt and Western Beaches. At least 80% of customers said Avivo staff talked to them about what they wanted. At least 75% of customers said Avivo staff talked to them about how they can help. At least 88% of customers said Avivo staff listen to them if they had a concern or complaint. Significantly less customers said Avivo talked to them about how their hours or funding were tracking (range across regions 37.5% - 77.8%). Best results were for Coral Coast and Wheatbelt.
2.2 Increased customer satisfaction with service	How happy are you with the services and support you get from Avivo? (Rating 1-10) Do you agree or disagree with the following statements (rating 1=strongly disagree, 2=disagree, 3=neither agree or disagree, 4=agree, 5=strongly agree):	On average customers rated Avivo 8.45 out of 10 for satisfaction with services and support. Average ratings for each region ranged from 7.25 to 9.48. Most satisfied customers were from Wheatbelt, Northern Beaches and Western Beaches. Customers agree or strongly agree that support staff were reliable and professional (average rating of 4.31 out of 5).

	• Support staff are reliable and professional. • I would recommend Avivo to someone who was looking for services.	Customers agree or strongly agree that they would recommend Avivo (average rating 4.25 out of 5). Fremantle customers were less likely to recommend Avivo.
2.3 Increased customer choice and control	How happy are you with the control you have of your services and supports? (Rating 1-10) Do you get to decide (rating 1=never, 2=rarely, 3=sometimes, 4=often, 5=always): • Who supports you? • What the workers do for you? • The days and times you get support and services? Do you agree or disagree with the following statement (rating 1=strongly disagree, 2=disagree, 3=neither agree or disagree, 4=agree, 5=strongly agree): • I can make changes to my Avivo services.	On average customers rate Avivo 7.93 out of 10 for satisfaction with the control they had over services and supports. Average ratings for each region ranged from 7.0 to 8.86. Most satisfied customers were from Wheatbelt, Northern Beaches and Western Beaches. Customers said they were "often" or "always" able to decide what the workers do for them (average rating 4.29 out of 5) and the times they got support (average rating 4.22 out of 5). Customers said they "sometimes" or "often" could decide who supported them (average rating 3.84 out of 5). Coral Coast customers were more satisfied that they could decide who supported them "often" or "always". Customers agree they can make changes to their Avivo services (average rating 3.92 out of 5).
2. 4 Increased customer achievement of personal goals	Do you agree or disagree with the following statement (rating 1=strongly disagree, 2=disagree, 3=neither agree or disagree, 4=agree, 5=strongly agree): • My services help me to do what is important to me.	Customers agreed or strongly agreed that their services help them to do what is important to them (average rating 4.4 out of 5).

Avivo Stop and Learn Workshop 1

Workshop Report

WORKING LOCALLY

An Action Learning component of the project evaluation

August 2017

CONTENTS

EXECUTIVE SUMMARY

Background

The Stop and Learn workshop held on July 28th 2017 was the first of a series of events that will form the key action learning component of the overall two-year evaluation of Avivo's Working Locally project[1].

The workshops are planned to provide an extremely valuable opportunity to share on-the-ground experiences and facilitate reflective discussion involving Team members and other key participants closely involved in the roll-out of the project across the whole organisation. Approximately 60 people participated in the first workshop.

Team presentations were a key component of the workshop. These were followed by mixed group discussions drawing out the major ideas emerging from the different Team presentations and by critical reflection on next steps and hopes people shared for the project moving forward.

Further Stop and learn workshops are planned for *October 2017, February and May 2018*.

Some (but not all) of the participants in this first Stop and Learn workshop were directly involved in the May Shaping Our Future Workshop where a Roadmap to working locally was developed. As a consequence, the level of awareness about the Roadmap was mixed amongst participants.

Participation in this first Stop and Learn workshop was enthusiastic and much was learned about the Working Locally process so far, providing a strong backdrop for future directions. Certain over-arching key messages recurred throughout the discussion topics and across participating groups.

Project roll-out

Over the past year the project has operated a small number of 'initiatives' or trials of Local Teams working towards a more autonomous approach to local service provision. Participants frequently asked how the organisation would make the 'BIG STEP' towards more universal application of Local Teams.

Clarity and direction

Many participants sought greater clarity and communication about the overall directions of the project, what it hoped to achieve and what was being learned through the Local Teams. Flexibility that comes with autonomy was appreciated but also the need for it being managed to a well-developed plan.

Model or models

The discussion of 'models' emerged frequently. Some of the discussion suggested participants are looking for 'a' model; others recognised and accepted that variety and diversity would be inherent to working more autonomously at a local level.

Commitment and caution

Issue relating to employees featured highly throughout the discussions and indicated that while there was obvious commitment and enthusiasm for what greater autonomy and working locally could offer, people were also concerned about the impact of the changes on them individually and as noted: *'What about the workforce that doesn't want to come on the journey?'*

Employee concerns

While many stories were heard about the benefits of working in a less isolated way in Local Teams, concerns were also noted about how the changes would impact on the nature of their work, their relationships with other staff and the people they were supporting, the skills they would need to operate in the new way of working, and in fact whether they would have a job.

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[1] See the Working Locally Roadmap and Program Logic for more details of the project.

INTRODUCTION

This report documents the first Avivo Stop and Learn Workshop held on July 28th, 2017 and planned around the Working Locally project.

Participants

Approximately 60 people participated representing:

- Members of Avivo's 2016/17 Working Locally Initiatives
- Members of Avivo's Leadership Forum
- Members of the Team Framework Working Group

Objectives

The workshop was focussed on:

- Sharing on-the-ground experiences of Working Locally Initiatives
- Documenting key achievements and challenges of Working Locally
- Reflecting on lessons for moving forward.

Outline of the day (9.30 for 9.45 start)

9.45-9.55 Introduction	Introduction, overview and housekeeping	Anne Butorac
9.55-10.15 The Journey	Why we are on the Working Locally Journey and key milestones	Rosie Lawn
10.15-11.15 From the field (i)	Team presentations and conversations (30 minutes each)	(i) Perth Hills (ii) Northern River
11.15-11.30	**Tea break**	
11.30-12.30 From the Field (ii)	Team presentations and conversations (30 minutes each)	(i) Wheatbelt (ii) Northern Beaches
12.30-1.00	**Lunch break**	
1.00-1.15 Re-cap	Re-cap and further opportunity for clarification across all Team Initiatives	Open forum
1.15–2.45 Reflection 1	Key Working Locally lessons so far	Worksheet 1 & Mixed groups
2.45-3.30 Reflection 2	Moving forward	Worksheet 2 & Mixed groups
3.30-3.45	**Break**	
3.45-4.15	Insights into the day	Open forum
4.15-4.30	Close (Rosie Lawn)	

SECTION 1   TEAM PRESENTATIONS

Local Teams were allocated a 30-minute 'From the Field' slot on the program, and were invited to make a short presentation (in a format of their own preference) around, for example:

- What their initiative is about
- How they got started
- What they saw as key achievements to date
- Any bumps or highs they encountered along the way
- Where to from here?

These opening sessions were focused on information transfer and became the basis for general discussion and reflection later in the day.

1.1   Perth Hills

The Perth Hills initiative was to build teams delivering support within a local area, working closely with customers and their families to work out what is needed and how they could manage this themselves. The NDIA has been operating in this area for over 3 years and has had a major impact on customers who live in the area and the Avivo staff who work with them. The Perth Hills Area has trialled numerous ways of working within this context whilst also providing services to people with aged care funding through HACC and Home Care Packages. Work roles have been aligned with the customer journey by having dedicated posts who have experience in disability or aged care and who is responsible for responding to new enquiries, designing support, establishing budget and management options, processing new registrations and undertaking reviews.

Support Facilitator roles have been developed to work within a cluster of suburbs supporting customers within the NDIS to develop the support plan and set up support by either matching and introducing or recruiting support workers (SWs). The Support Facilitator is responsible for the quality of ongoing support by leading and supervising teams and responding to day-to-day operations such as rostering, reporting, budget management, provision of direct support and promotion and marketing. The Support Facilitators also provide direct support to customers.

The Team also has a centralised administration role that undertakes non-customer-facing tasks.

The presentation also highlighted 'Challenges', 'Achievements' and 'Where to Now'. (See Attachment 1 for the Perth Hills team's overview of their presentation.)

1.2   Northern River

Northern River has a mix between NDIA, WA NDIS and the regular funders, which prompted them to test the concept of self-managing teams within the current systems of Avivo. Northern River presented on the Support Development team and the Mental Health team.

The Support Development team was established to be able to respond more quickly to new referrals and the setting up of customer support. The team commenced in December 2016 with a six-month contract so the success of the role could be monitored. It has had some success, and the contract has been extended for a further six months.

The Mental Health team had been working as a self-organised team for some time and it became a formalised way of working, reconfigured to the self-managed approach. The team has 3 current members, including a Recovery Guide, who work with approx. 25 to 30 customers. Recruitment of a new team member is underway and is a good example of how the team jointly make decisions; the whole team work together from the creation of the advertising to the final interviews.

The presentation identified examples of self-management, as well as challenges, across the Northern River Local Teams. (See Attachment 2 for the Northern Rivers team's overview of their presentation)

1.3 Wheatbelt

The Wheatbelt covers a wide geographical area organised into distinct local areas usually supported by a Team Facilitator. A small intake team, located in Northam, respond to all referrals. This team includes two advisors with specialist knowledge and skill in the aged care, disability and mental health sectors. They respond to referrers and customers, develop budgets and plans before providing to a local teams to take forward setting up supports with the support of the advisors

Due to the distances the Wheatbelt Area has been structured to work geographically. The working locally initiative over the past year focussed on Northam with two distinct local teams; a neighbourhood team and customer-specific teams. This was stimulated by the NDIA expanding its operations into parts of the Wheatbelt with a significant number of people living in and close to Northam.

The neighbourhood team has been established with 4 staff members including a Team Facilitator supporting 23 customers with low to moderate support requirements. Customer specific teams in Northam work with 12 customers each with a team of around 3 SWs. These teams have a local Team Facilitator. Both of these initiatives are self-rostering, managing recruitment, looking at different ways of communication, for example through Microsoft team's page and sharing responsibilities across the whole team.

A self-managed team, without a Team Facilitator, has recently been set up in the Southern Cross area.

The presentation also highlighted what is working and what needs improving. (See Attachment 3 for the Wheatbelt team's overview of their presentation.)

1.4 Northern Beaches

Northern Beaches currently supports people with a range of Aged Care, Disability and Mental Health funding but does not as yet have NDIS in the area. Northern Beaches faced a problem with many customers cancelling their supports if their usual support worker was not available and as a consequence customers often doing without support for 1 – 4 weeks at a time. This led to looking at customers living in particular suburbs, the support they received and exploring the possibility of building a small team of SWs who worked together to provide these services to people living in these suburbs. Over time, the regular support workers have introduced another team member to the customer to assure continuity of support.

Though the individual members had previously worked with customers in a geographical area, they hadn't worked collaboratively as a team. The team first got together in Aug/Sept 2016 with a Team Facilitator who brought them together on a regular basis to share with each other the updates around the customers they supported. The team shares and covers for one another, with individual members interested to find out about customers and ready to fill in where possible. Learning to communicate has been a big lesson and individual team members have expressed the difference sharing with others has made to their work. (See Attachment 4 for the Northern Beaches team's overview of their presentation).

1.5 Additional insights from across all teams

Additional individual team member comments relevant to the presentations (noted below as recorded after the presentations) have been themed to include:

Personal wellbeing and development:

- *We must look after the health and wellbeing of each other.*
- *A key issue is to support everyone in the process – think about ways to do that.*
- *There has been a lot of development work within the team.*
- *With a new role and new employees, we can train SWs as the team requires.*

- *Peer support has worked well.*
- *We need to note the emotional impact this has had on everyone, but also acknowledge the good times.*

Working together:

- *There is a good sense of trust within the team – all have similar values.*
- *Important – think about where the power sits, this is a partnership – get more people involved,*
- *We all have our own perspective.*
- *Admin support within teams is important – consider what is important.*
- *It is challenging not having a 'leader'.*
- *A leader is assigned – depending on circumstances.*

Communication:

- *Communication – the way we talk is important.*
- *In the past we couldn't find time, now we have regular team meetings and look at the rosters*
- *There has been conflict of issues within the team.*
- *No conflicts – we respect one another and all contribute.*
- *PA check-ins are good.*

Moving on:

- *There needs to be a common understanding of what works and what doesn't (before moving on to the next phase).*
- *A better sense of what is done by support functions would be good.*
- *Is there anything in place for staff recognition when someone goes above and beyond? (Yes You) … nominations from any source – quarterly and make this known.*
- *Ideas, concerns and hopes can be taken up by working groups.*
- *Talk about the positives as uncertainty has created anxiety.*

Team size:

- *Smaller teams work well but bigger teams (which may have benefits for some customer) need to be reassessed and worked on.*
- *When we took on more customers, we needed to organise ourselves better.*
- *Consider size of teams within a focus on people and neighbourhoods.*
- *It is hard to meet expectations because we have had a lot of growth.*

SECTION 2   REFLECTIONS

As indicated in the program for the day, a large part of the afternoon session was dedicated to participants working (in 8 mixed groups of 7-8) to reflect on the morning's input from Local Teams. Four questions were pursued:

- What are the key messages from the Team Initiatives?
- What are your unanswered questions or concerns?
- What do you think are key next steps to Working Locally?
- What are your key hopes as we move forward?

Individuals were given the opportunity to note their specific thoughts before moving to group discussion. The following record of the group reflection sessions is based on a thematic analysis of group outcomes around each question.

In order to indicate the strength of ideas that emerged from the discussion groups, under each heading and subheading, the ideas are ordered from most to least dominant. Ideas are represented as closely as possible to how they were recorded in group feedback (on butcher's paper).

2.1   Key messages from the Team Initiatives

Table 1: Quantitative analysis of key messages (n=84 items)

Key message themes	*Number of responses*	*% of responses*
Working in a team	16	19.0%
Autonomy & decision-making	15	17.9%
Communication	12	14.3%
Efficiency/Flexibility	11	13.1%
Customer focus	9	10.7%
Technology	8	9.5%
Knowledge and Understanding	6	7.1%
Miscellaneous	7	8.4%
TOTAL	**84**	**100%**

2.1.1   *Working in a team (19.0%)*

The strongest stream to emerge from discussions around key issues related to aspects of working in a team. Though working in teams may not have been an entirely new experience for many, people commented on the different ways of working in teams as described in the Local Team presentations. Specifically, the Local Team experience highlighted:

- A balance between flexibility and security for the team members.
- A less isolated and more supportive work environment where *'many hands make light work'.*
- Coming together to solve problems as an essential aspect.
- Trust, respect and good relationships as a key to success.
- Happier, more connected teams where people can enjoy working in teams and contributing.

Overall comments suggested there were *'fewer bumps than anticipated',* and that '*the positivity, engagement and commitment demonstrated by the team today'* [the Stop and Learn workshop] were indicative of the overall change process.

2.1.2 Autonomy & decision-making (17.9%)

Another strong theme to emerge around key issues related to teams making decisions more autonomously, and alongside this what was described as an inherent 'permission to fail'. Working in a more autonomous decision-making mode highlighted:

- Teams achieving desirable outcomes, but within their own systems and around different initiatives.
- Teams being prepared to innovate and problem-solve.
- Access to information (and through technology) as a pre-requisite for autonomy.
- Having permission to fail - the first attempt may not get it right.
- The freedom to try, fail and then regroup and try again.
- The need to encourage support worker involvement.
- Success is possible.

2.1.3 Communication (14.4%)

Closely linked to the previous themes, the importance of good/improved communication within teams also emerged as an important consideration, for example:

- Communication within the teams essential and, importantly, involves '*figuring out what works'.*
- Communication needs to be open, transparent and often.
- The sense of belonging and connectedness happens as a result of communication within teams.
- Communication can help clarity expectations.
- Documentation of the journey (via YourLink) an important consideration.
- Communication also involves sharing information with customers.

2.1.4 Efficiency/Flexibility (13.1%)

Working locally was also seen to contribute to greater efficiency and flexibility in a number of ways, in that it offered:

- More efficient processing, e.g. teams making changes as and when it occurs, without going through 'head' office.
- Flexibility for the staff and customer, with flexible support attracting more referrals.
- Better decision making close to customer enabling SWs to make decision.
- Adaptability/ flexibility around funding regional/metro setting.

However effective Local Teams also relied on factors such as:

- Openness to change - changing culture offering challenge and a variety of models.
- Quality staff determining outcomes – hence importance of recruiting capable staff.
- Grouping tasks and functions together.
- As no 2 teams are the same, developmental needs will be different.
- Small team connections … office space … networking.

2.1.5 Customer focus (10.7%)

Some of the discussion also drew out key messages that focussed on customers, for example:

- Strong team focus around customers and the continuity of service offered by teams.
- The importance of the initial conversations with customers and teams.
- Better customer support and connectivity between customer and staff because of better communication.
- Community impact – the issue of 'knowing people' who need support in local community – customer impact or wishes.

However, the question was also posed about customer knowledge of the changes ---: *'Do we know how customers have found this?'*

2.1.6 Technology (9.5%)

Access to resources and technology was also highlighted, for example:

- Technology is essential for efficiency and data entry.
- Technology and processes are essential to enabling all this to happen.
- Technology is key, yet not all teams have the technology.

2.1.7 Knowledge and Understanding (7.1%)

The need to know and understand the Working Locally concept and the process of change was also mentioned (for a range of stakeholder, but especially SWs who were referred to frequently), for example:

- The importance of training – both customer-related but also funders, information management and finance/budgets … What tasks need what knowledge?
- Support workers need to understand the concept.
- The right people with the expertise and knowledge is important, e.g. Disability, Aged Care (Reason for change – customer needs to know).

2.1.8 Miscellaneous (3.6%)

Miscellaneous other comments related to:

- *Employee issues* around financial security and security of hours; the potential conflict between support worker hours and the capacity to cover other team members; and the personal impact of changes of hours or loss when paid on hours worked.
- *The size of teams* and issues of not enough hours if team too big; and the impact on team management as volume of work increases.
- *The whole process of change* takes time and it doesn't work if we expect everyone to do everything. The complexity of the change can be stressful and can lead to errors. Having "Go To" specialists may be helpful.

2.2 Unanswered questions or concerns

Table 2: Quantitative analysis of unanswered questions/concerns (n=55 items)

Key message themes	*Number of responses*	*% of responses*
Employee level	18	32.7%
Whole-of-organisation level	16	29.1%
Local Team level	15	27.3%
Customer level	6	10.9%
TOTAL	**55**	**100%**

In the following thematic analysis of Table 2 data it should be pointed out that distinguishing between the four levels was not always easy; understandably, there was considerable overlap across the levels, but an attempt has been made to target questions/concerns where they are most pertinent.

2.2.1 Employee level (32.7%)

The greatest proportion (almost 1/3) of the group reflection themes related to unanswered questions and concerns were about employees generally: about safeguarding their employment, about their rate of pay; and about recruitment. More specifically questions and concerns included:

- How do we recruit the best people and whether generalist or specialist staff (Disability/Aged Care) and what if we can't recruit?
- Should we employ more fulltime SWs and how do we pay them competitively for the work they do (an issue of staff retention)?
- Salary issues (hourly rates related to flexibility, choice and control) and how do we compensate for additional responsibility – pay etc., admin, communication about shifts?
- How do we allocate work within teams, maintaining choice and control and ensuring staff are not disadvantaged when we re-organise teams locally?
- Are people overwhelmed by new expectations in their roles … what training (formal/informal) is needed?
- What happens to career progression and '*Where do I fit in the new structure*'?
- Working at home – emails, personal phones.
- How can we manage conflict and HR issues?
- What about the workforce that doesn't want to come on the journey?

2.2.2 Whole-of-organisation level (29.1%)

A second category of unanswered questions/concerns were directed at a whole-of-organisation level, notably about how the local focus might look across the organisation and broader management of the process and aspects of quality and financial viability. For example:

- Looking at benefits vs risk and what damage control if things don't quite go right i.e. customer satisfaction … reputation.
- How will this look across Avivo, i.e. Wheatbelt/Jandakot?
- How do we build a culture of trust and adopt/support horizontal management?
- Measures: What is the ideal ratio between direct and indirect work to ensure that quality of service is maintained? How to monitor and meet compliance/share data?
- Is there anything we should be doing less of?
- What are the future employment and development opportunities?

- Financial viability and modelling – personal and organisation (Models, increased team meetings) (Team budgets – can we pay salaries).
- What is the ideal ratio to ensure services are viable financially?
- How do we manage the administration: tasks and time?

2.2.3 Local Team level (27.3%)

Another large proportion of the unanswered questions/concerns were more closely aligned to the level of Local Teams, for example:

- What's in and what's out for Local Teams i.e. what tasks/decision belong in the team and those for others to do?
- Team roll-out from the trial project team to throughout is a BIG STEP! How do we achieve this? How do we support areas who have not commenced with a local team trial yet?
- Are the trials set up long term?
- Issues of 'boundaries' and work ethics – are these team-controlled?
- Teams still seem to have a 'leader'. Do we need a 'contact' (chief) to call on – has knowledge and qualified to be a "go to" person?
- Models – are these essential?
- How many models? Regional and Metro … different models are being tested – how will we decide on one or will we have varieties.
- Are these models cost effective?

2.2.4 Customer level (10.9%)

Though it was a less-frequently mentioned area of concern, groups also noted unanswered questions and concerns related to customers and safeguarding their service provision, for example:

- Concern customer choice may be limited.
- Some customers will have to adjust to a new SW. What do they actually hear about the changes? This needs to be consistent.
- Customers feeling the vulnerability of knowing local SW.
- What about the customers who don't want to change?

2.3 Key next steps to Working Locally

Table 3: Quantitative analysis of key next steps (n=62 items)

Key message themes	Number of responses	% of responses
Whole-of-organisation level	27	43.5%
Team level	21	33.9%
Employee level	7	11.3%
Evaluation / learning from practice	7	11.3%
TOTAL	**62**	**100%**

2.3.1 Whole-of-organisation level (43.5%)

Almost half the responses relating to what were seen to be the next key steps in Working Locally were targeted at a whole-of-organisation level and in many ways encapsulated unanswered questions and concerns indicated previously. Areas included:

The overall direction of Working Locally

- Ongoing conversations with customers and staff about where we are going as an organisation: do we really understand what this is about?; Can we afford this? - undertake financial modelling.
- Identify what the Avivo way is for consistent service and quality.
- Embedding the advice / decision making process.

Ongoing Team roll-outs

- Finish Mapping process and put plans in place for next stage roll out.
- Build more teams/networks and ensure technology support.
- Provide access to technology.
- Knowledge areas and also areas of support required i.e. support functions that compliment/ support team as opposed to tasks that teams need to perform.

Back office

- Costing of models.
- Office people really understand the work and really understand the context we are working on.
- Work out work conditions.

Communication/relationships

- Respect existing relationships and acknowledge there will be exceptions.
- Communication and engagement across whole organisation - communicate Roadmap to customers and SWs … to everyone!
- Not reinventing the wheel. Capturing the learning and sharing with all.

The Framework

- Agree on the framework to provide clarity and direction: what's in and out; what's negotiable / not negotiable; what can I do to start?
- Finalise and communicate decisions made by the Framework working group e.g. what functions go to Local teams and which stay centrally will move teams forward as to how they organise themselves.

Training

- Promote new ways of working through training and technology – develop skill set to multi-task and cover others' roles.
- Training from back office – Finance / Marketing.

2.3.2 Team level (33.9%)

Another large proportion of key next steps were more directly targeted at Local Teams, notably around the following:

How Local Teams work

- Which model/s are we taking forward?
- Out of all the initiatives will we end up with one consistent model?
- Define roles clearly: Who's the 'Go To' person for clinical teams/carers?
- Provide examples of decisions SWs can now make.

Team size/structure
- What size of teams work best … small or big?
- How did NDIS impact on team structure and function?
- Teams – how many can I be involved in?
- A need for regular updates – team meeting structure.

Developmental needs
- Support and development needs for the team need to be determined.
- Build teams effectively – training and have Team meet and greets. Also look at opportunities for individual up-skilling and Team skills/areas development.
- Determine the strengths of staff in the teams and empower them to be confident.
- What's in and out of teams and agree?

Customers
- Engaging customers throughout the process

2.3.3 *Employee level (11.3%)*

A few 'next steps' were also directly targeted at employees, for example raising the questions of whether: '*More responsibility = more pay'* and about *'SWs doing extra work but not being paid.'* Recruiting and rostering wisely were also mentioned, as was the need for *'coaching and mentoring SWs'.* One group recorded *'lots of worries'* about getting the balance right with SWs and the need to have *'more SWs involved in discussion groups.'*

2.3.4 *Evaluation / learning from practice (11.3%)*

Another smaller group of next steps clustered around evaluation, measuring success and learning from practice, for example: the value of TALK – SHARE – LEARN, i.e. learning from existing practices and structures what works well, what doesn't. One group also highlighted the value of *'capturing the learning from today [the Stop and Learn workshop} and using this in the Roadmap plan'*.

2.4 Key hopes as we move forward

Table 4: Quantitative analysis of key hopes (n=63 items)

Key message themes	*Number of responses*	*% of responses*
Managing the process	18	28.6%
Employee focus	17	27.0%
Understanding/Communicating the change	13	20.6%
Avivo's image	9	14.3%
Customers	6	9.5%
TOTAL	**63**	**100%**

The final reflective question tapped into participants' 'key hopes' as Avivo moved forward with the Working Locally project.

2.4.1 *Managing the process (28.6%)*

Issues relating to overall management of the change towards Working Locally featured strongly and included aspects of a common commitment and purpose and ensuring the process proceeded as smoothly as possible and built on Avivo's good foundations. Hopes were for:

Planning

- Well-planned change management process, building on what we have.
- We gain clarity not chaos, break new ground.
- More direction on what's expected and when to change.
- Agreeing parameters/boundaries with guidance around flexibility.

Commitment and common purpose

- That everyone is supported and that it works.
- That teams embrace, maintaining the passion, pride and relationships.
- No divide between field/office and we work as one team, working together to a common goal.

A smooth transition

- That it is a smooth transition.
- It happens with the least amount of upheaval, least amount of pain and that technology keeps pace.

Viability

- That very soon we see the positive impact on our business's bottom line.
- Working 'smarter', with more efficiency for all.

2.4.2   Employee focus (27.0%)

In line with previous dominant themes of discussion, much of the discussion around key hopes also focused on employee issues.

Morale/wellbeing

- Better morale and existing staff are happy and content.
- People feel supported and that they are part of something special, with high levels of engagement/ satisfaction
- We look after people's health and wellbeing and people feel appreciated and valued for their work.
- We continue with this path of positivity providing staff satisfaction and a sense of belonging.
- Staff wellness and feeling comfortable in their roles.

Employment conditions

- Employment is more attractive and there is a reduction in staff turnover.
- Employment conditions and benefits meet staff expectations and people have good work/life balance.
- Field staff do not need to be concerned about their income and all SWs have ongoing employment.

Support through change

- That staff are supported through the change.
- Making a space where people can thrive and have security in their roles.

Decision making

- That there is independent decision making for teams.

2.4.3   Understanding/Communicating the change (20.6%)

People also expressed a hope for effective communication about the change so that all could better understand it.

All on board

- That we can get the message about this to ALL staff so that they trust and believe that together we can make it work! See the benefits!
- Everyone on board with the Working Locally vision and it becomes a reality.
- All understand we are on a journey moving forward with momentum.

Good communication

- Communication across the whole process is critical - regular, across all customers and staff.
- Openness and transparency around any roles that will be changing in a timely manner – good, safe conversations.
- Ensure processes and systems are simple and intuitive and everyone has access to the right technology.

Better understanding

- People are engaged around more knowledge and flexibility.
- Making sure uncertainty isn't too scary, building SWs confidence and skills.

2.4.4   Avivo's image (14.3%)

Participants also expressed key hopes relating to the maintenance and furthering of Avivo's image and reputation.

Trailblazing

- That we are seen as a market leader and trail blazer in the sector and beyond.
- Reputation 'intact' – Avivo is seen as the BEST.
- The future is bright and the organisation grows/develops based on its reputation.

Reputation

- Avivo's reputation remains or improves.
- People proud to work for Avivo – skills – training – high morale – well paid.

2.4.5   Customers (9.5%)

Participants also expressed hopes for Avivo's customers – that they: generally felt the benefits of the new approach: would be supported through the transition; were happy; and that it led to the best possible outcomes for them.

SECTION 4   KEY MESSAGES

Some of the participants at the Stop and Learn were directly involved in the May 'Shaping Our Future' Workshop where a Roadmap to working locally was developed. Because not all were involved in the Shaping Our Future workshop, the level of awareness about the Roadmap was mixed amongst participants.

The Stop and Learn events are a key component of the Roadmap and this particular Stop and Learn's object was to learn from the initiatives to inform the framework for working locally and the roll out of the project.

Participation was enthusiastic throughout the day. Much was learned about the Working Locally process so far and provided a strong backdrop for future directions. Certain over-arching themes recurred throughout the discussion topics and across participating groups.

Project roll-out

Over the past year the project has operated a small number of 'initiatives' or trial of Local Teams who, as indicated in the Team presentations, have been working towards a more autonomous approach to local service provision. A frequent comment made by participants related to how the organisation would make the 'BIG STEP' towards more universal application of Local Teams.

Clarity and direction

Many participants sought greater clarity and communication about the overall directions of the project, what it hoped to achieve and what was being learned through the Local Teams. While people may have understood and appreciated the flexibility of the move towards greater local autonomy, there was also an expression of needing the security of it was being managed to a well-developed plan.

Model or models

The discussion of 'models' has frequently emerged. Some of the discussion suggested participants are looking for 'a' model. Other discussion seemed to recognise and accept that variety and diversity would be inherent to working locally.

Commitment and caution

Issue relating to employees featured highly throughout the discussions and indicated that while there was obvious commitment and enthusiasm for what greater autonomy and working locally could offer, people were also concerned about the impact of the changes on them individually and also as one group noted: *'What about the workforce that doesn't want to come on the journey?'*

From a whole-of-organisation perspective, managing risk and maintaining Avivo's reputation as an employer and service provider of high standing featured prominently.

Employee concerns

Any organisational change raises employee concerns and this is certainly the case with this one. The concerns were about how the changes would impact on the nature of their work, their relationships with other staff and the people they were supporting, the skills they would need to operate in the new way of working, and in fact whether they would have a job. On the other hand, many stories were heard about the benefits of working in a less isolated way in Local Teams.

ATTACHMENT 1

Perth Hills Overview

The Perth Hills initiative was to build teams with a lead who oversee the day-to-day delivery of support in a local area. The teams work closely with customers placing them at the centre of planning, delivery and decision making by working alongside customers and their families to work out what is needed and manage this themselves.

The roles align themselves well with the customer journey by having an expert in disability, mental health or aged care, who is responsible for responding to new enquiries, designing support, establishing budget and management option and processing new registrations. The Support Facilitation role then with the customer writes the support plan and sets up support by either matching and introducing or recruiting SWs. The Support Facilitator is responsible for the quality of ongoing support by leading and supervising teams and responding day to day operations such as rostering, reporting, budget management, provision of direct support and promotion and marketing. We have a centralised admin role that undertakes non-customer facing tasks.

Challenges
- Implementing a new model while responding to rapid growth and a developing funder
- As customer numbers increased so did the workload and we realised that the initial structure wasn't sustainable resulting in some major changes i.e. the introduction of intake and centralised administration roles.
- Maintaining 70% of work as direct billable hours to customers can be difficult

Achievements
- Built a strong and resilient team
- Opened 3 local community rooms
- Working with fully digital processes
- A large provider of NDIS customers
- Examples of customer teams with autonomy and decision making at the centre
- Reduced outstanding debt and mitigated financial risk by making adjustments to roles

Where to now
- Expand model to include aged care
- Support facilitation is a transitional role to help build local teams. As local teams increase the SF roles are expected to reduce
- Continue to improve key processes and separate customer facing tasks with admin / back office functions
- Continue to increase direct work of Support Facilitators (affordability)
- Continue to introduce and test technology

Chris's presentation summarised

- Geographic areas were identified
- Moving toward Leading and Managing locally principle of working with customers as part of a team
- Credibility changes with SWs
- Has an impact of daily life
- Conversations are different and not just anybody at the end of the phone
- From a customer point of view, one of our customers is sharing experiences she is having and feels she now has more personal support. We are more accessible and have moved our support to Avivo

- Greater communication with SWs – more accessibility to improve overtime with technology. We now have the app and can chat when out in the field.
- Greater empowerment in the teams
- Reduction in training time
- We now have local offices (hot desks)
- Laptops are provided and the customers are able to sign their support plans as we can upload documents (this cuts down on time) - paperless
- We have a great team with good communication. We check in with each other regularly and help where necessary
- We are doing 30% direct work to cover wages and plan to have 85% in local areas by 2020
- SWs are very excited about the road-mapping and we are moving forward as required.

ATTACHMENT 2

Northern River Overview

Northern River was in the unique position of having a mix between NDIA, WANDIS and the regular funders which prompted us to test the concept of self- managing teams within the current systems of Avivo.

Support Development team

The need to be able to respond more quickly to new referrals and the setting up of customer supports was identified, leading to the inception of the Support Development team. The team commenced in December 2016 with a six-month contract so the success of the role could be monitored. The team has had some success, and the contract has been extended for a further six months.

The Support Developer team's objective was to be more responsive to the customer's needs in a shorter time frame. The team is specifically trained in both skills of high care and self-management and solely for the purpose of start-up, and building of the regular team that will take over from the Support Developers.

The Support Developer team meets the customer and based on the customer's plan, the team can commence services. The team works closely with the customer, but only for a short period of time - four to six weeks.

During this time, the team begins the process of identifying the type of workers the customer is looking for and commence the recruitment, including the customer. Support Developers are also responsible for their induction and training of new workers. Once the regular is team is in place, the Support Developers will have already begun the process of withdrawing from that service.

Challenges

- Changing internal perspectives from current culture to new ways of working, Systems and processes need to be developed Managing the relationships: The social skills of the Support Developers are critical
- Administration time interferes with direct support
- Decentralizing the decision-making process
- Learning how to change the operating norms and rules within the team Additional hours/after-hours resulting from unforeseen circumstances.
- Group supervision is limited due to the time constraints

Mental Health team

The mental health team had been working as a self-organised team for some time, until Avivo embraced the self-managed concept. The team became a formalised way of working, and reconfigured to the self-managed approach.

We have 4 to 5 workers, including a Recovery Guide and work with approx. 25 to 30 customers. This role has shifted more into the supporting role rather than a leading role. Recruitment of a new team member is underway and is a good example of how the team make decisions, and not led by one person. The whole team work together right from the creation of the advertising to the final interviews. This decision making will also include one or more customers.

Referrals are distributed from the Area manager, directly to the team who view the referral and decide who will follow through for the initial contact with the customer. This process is very similar to that of the Support Development team.

New customers are introduced to with no external workers called upon to provide covers, fill annual leave. The team manage their own cover – leave etc. The team do work autonomously from the office, and will seldom contact the office. Generally, the team will only contact the office when technical issues arise, or financial assistance is required. The team will schedule their own supports in consultation with the team and relevant customers.

The team is able to not only schedule and enter their supports, arrange leave, but also they are involved in the networking and seeking of new referrals. Currently, the Area Manager discusses potential referrals with the finders, and promotes the benefits of the mental health team.

This has been a longer term goal, with the intention of the team being responsible for managing the referrals outright, and maintaining their reputation as the self-managed mental health team.

Challenges:

- Having a full roster takes away the ability to cover for another team member
- Transitioning customers from the area to the 'mainstream' area that function in a different manner
- Continual need to upskill/training – resources not available as need arises, and the time to undertake training
- Team dynamics do differ from team to team, and the organisational approach tends to adopt a 'one size fits all'
- Every team member should be cross trained in every other team member's tasks, and where they are with the customers recovery work.
- Team member selection is critical for the team's success, which is time consuming within a busy schedule.

Sam

Motto: Keep this as simple as possible because the customers are simple even though their needs are complex.

- 25 – 30 people (Getting more people on board)
- Work alongside the customer journey
- Staff manage team – work autonomously

Eva

- Objective – better outcomes for the customer by providing excellent service
- All customers meet the whole team and everyone makes decisions
- Supportive working environment
- Streamline decision making
- Work in specific ways for good outcomes for organisation
- Collaborate – customers, families and coaches

Peer Support

- As all 3 are involved with each other – no hierarchy - Weekly catch up meetings
- Original perspective – taking work off Resource team
- Team doing own rostering
- Have laptops and mobile phones with apps which are helpful

![avivo logo]

ATTACHMENT 3

Wheatbelt Overview

Over the last 10 months the Wheatbelt area has evolved to meet the changing needs of the area due to funding changes, growth in customers and also to meet the geographical diversity and challenges this brings around recruitment and travel.

Wheatbelt have in place a small intake team, all referrals come into a generic email box and picked up usually by Slade for disability enquiries and Odette around aged care. They contact referrers and customers when required, develop the budgets and plans then pass to local teams to take forward setting up supports. This team also gives support to team facilitators and SWs when needed, helping people think through questions and signposting where required.

The Wheatbelt area has been separated into distinct local areas and neighbourhood teams are now operating within these usually supported by a team facilitator. There is also a self-managed team recently set up in the Southern Cross area. An initiative in Northam is currently operating around a distinct neighbourhood team with 4 members of staff supporting 23 customers with low to moderate support requirements. Customer specific teams are also in place in Northam with 12 customers who have a team of around 3 SWs in place around them. Both of these initiatives are self-rostering, managing recruitment, looking at different ways to communicate together for example through Microsoft team's page and sharing responsibilities across the whole team.

Feedback from the team includes what is working is:
Support workers taking ownership
Flexibility for customers
Learning new skills and building capacity
Team supporting each other and communicating well
All willing to help and move forward.

What needs improving?
Clarity around roles
Advice and decision making
Reporting to funding bodies
Easier access to technology and systems.

ATTACHMENT 4

Northern Beaches

NBS started to think about how to better support people who receive basic HACC support into the future. They were seeing that many of our customers would cancel their supports if their usual SW was not available due to sickness or holiday leave.

This meant 2 things – customers may do without support for 1 – 4 weeks at a time. Avivo couldn't claim hours we didn't provide and other SW didn't have the chance to meet new people to make up their rosters for the week.

They decided to have a look at who was where and how much support they had and build a team of SWs who worked as a team, who introduced someone else in the team when they were on leave, customers felt they had the support they needed through the year.

The NBS team was already established as they previously worked with customers in a geographical area but they hadn't worked as a team in the past, this was the difference. The team first got together in Aug/Sept 2016; with Di as TF who brought them together on a regular to share with each other the updates around the customers they supported. At that time most of them said that they didn't need any other work and weren't really available to pick up any more.

Laura attended the last team meeting to find a very different TEAM. They shared, covered for one another, were interested to find out about customers and were ready to fill in if they could.
Some mistakes were made along the way – communication was the biggest learning curve. They soon realised how to communicate to others what they had planned to do was critical.

One word used was "postcodes", a customer did not want to be referred to as a postcode - rightly so. Along the journey the team thought about their choice of words and tried to see it from all perspectives. Customers have the support they need, when they need it, and are willing to meet others in the team.

They are still modifying how and what we do and will include customers who receive Level 2 Home Care Packages into the neighbourhood teams which will mean they would possibly split the first area into 2 to accommodate everyone which will mean building another team.

Mitzi felt that "getting to know other SWs was great and wanted to get to a stage where the team were self-sufficient".

Di mentioned that looking back on when she first started, 9 years ago, she felt very isolated – she now feels very included and part of a "team"

Avivo Roadmap.

Streams, collaboration and Working Groups

Working Locally.
avivo

Streams

There are four streams of work for the Roadmap tasks – Planning & Evaluation, People & Development; Comms & Engagement; and Technology, Systems & Facilities.

Collaboration

Collaboration is the joint effort to accomplish a task or project. It is challenging and will take new thinking and practice. We will need to collaborate within and between our Working Groups and streams, seeking advice, ensuring we listen to each other and create spaces where we can work together.

Working Groups

Working Groups are where we do our collective work for the Roadmap. They may be initiated as an outcome of a collective process or by an individual or group with a particular need. Working Groups will be recruited by invitation and will work together for the time required to complete the tasks.

PLANNING
Planning & Evaluation

PEOPLE
Our People & Development

TECH
Technology, Systems & Facilities

COMMS
Communication & Engagement

COLLABORATION

1 — Working Locally.

KEY

1. Roadmap Hub
2. Team Framework
3. Team Mapping
4. Systems
5. Enabling Through Technology
6. Comms & Engagement
7. People Support
8. Stop and Learn; What's Next?
9. Customer Engagement

Working Group

Pop-Up Working Group

Working Locally Activity Plan to support Roadmap

Work stream	Activity	Milestone	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18
			Getting Ready			*Getting Going*								
Planning and Evaluation	**Governance**													
	Put in place mechanisms for governance, working groups and coordination of work	End Sept 17	▬	▬	▬									
	Provide performance and compliance information to teams	Ongoing						▬	▬	▬	▬	▬	▬	▬
	Develop budget and financial reports for FY18/19 for working locally	End Jun 18										▬	▬	▬
	Mapping of customers and support workers													
	High-level mapping of potential teams across Avivo	End Sept 17	▬	▬	▬									
	Community Service regions develop detailed maps of teams and transition plans	End Dec 17				▬	▬	▬						
	Developing team frameworks													
	Develop framework for local teams	End Sept 17	▬	▬	▬									
	Develop frameworks for back office (administration and coordination) teams	End Mar 18				▬	▬	▬	▬	▬	▬			
	Back Office teams develop transition plans	End Jun 18									▬	▬	▬	▬
	Learning and Evaluation													
	Develop and agree evaluation methods	End Aug 17	▬	▬										
	Hold regular reflect and learn events	Periodically		▬			▬			▬				▬
	Put in place measures and processes to inform teams of progress	End Dec 17		▬	▬	▬	▬	▬						
	Refresh Roadmap	Periodically				▬	▬			▬				▬
People and Development	**Planning**													
	Develop plan to negotiate new employee conditions	End Sept 17	▬	▬	▬									
	Develop plan to consult and support our people through the transition	End Sept 17	▬	▬	▬									
	Enterprise Agreement Negotiations													
	Consult with field employees on current conditions and ideas for new EA	End Dec 17				▬	▬	▬						
	Prepare draft field EA as basis for negotiations	End May 18						▬	▬	▬	▬	▬	▬	
	Preparing teams for changes													
	Individual consultation with field staff	End Dec 17				▬	▬	▬						
	Individual consultation with back office staff	End Jun 18								▬	▬	▬	▬	▬
	Provide support for those affected by potential job changes.	Ongoing				▬	▬	▬	▬	▬	▬	▬	▬	▬
	Identify essential training and development needs for employees	End Dec 17				▬	▬	▬						
	Teams forming													
	New community services teams forming.	75% by Jun 18							▬	▬	▬	▬	▬	▬
	New back office teams forming												▬	▬
Communications and Engagement	Develop comms & engagement strategies	End Aug 17	▬	▬										
	Hold local events to discuss working locally, roadmap and what it means for them	Periodically		▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬
	Conduct individual consultation with all affected customers	End Dec 17		▬	▬	▬	▬	▬						
	Hold regular meetings with "Experts by Experience"	Periodically		▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬