

## **Merri Outreach Support Service's** **Feedback from HAS Self-Evaluation Process**

Merri Outreach Support service (MOSS) was one of the four trial agencies for the Homelessness Assistance Standards (HAS). We have completed the process of review and have commenced working through the resulting list of actions to meet the standards. The process has been an interesting and useful one for the agency.

Below we have noted some brief points about processes we found effective / useful, benefits to MOSS and issues with the process that we encountered in completing the self evaluation process.

Please find attached a step by step outline of the process we followed as well as an appendix of the documents and tools MOSS created to assist the process. Please note, we have included these tools in part to give a sense of how MOSS approached the HAS process and the additional work required, and to provide some ideas for other agencies who may go through this process.

MOSS used the HAS kit as a guiding tool and found it a useful document. However, as indicated by the tools we created, there was a need to adapt and add to it for our purposes.

### Useful Process:

- Having a coordinating group to guide the process, and give and seek information for working groups to ensure adequate evaluation of each standard.
- Coordinating group acting as a filter for all information. Note: all information, included completed workbooks were emailed to coordinating group and reviewed.
- Where appropriate, some standards were sent out to the agency via email for further comment.
- that MOSS already had developed working groups with allocated weekly time slots
- strong pre-existing awareness of HAS due to MOSS involvement in drafting committee and feedback to all of agency about this process, management promoting HAS standards right throughout drafting process and also once MOSS became a nominated trial agency.
- COM and Management support for trial.
- Self-selecting coordinating group with strong staff members willing to give up their time.
- Coordinating group consisted of one staff member at each MOSS site.
- Inclusive process with a lot of communication amongst all staff throughout process. Not "top-down". Helped to create a sense of enthusiasm for process.
- Developed timeline factored in importance of flexibility and need for some parts of process to be extended.
- Having each working group report back at plenary group meetings.
- Included surveying own clients and other agencies met a standard in itself...the whole process helped MOSS meet the evaluation process and begin thinking about continuing an evaluative process.
- Meeting with other trial agencies to gain ideas about how other agencies implement process
- HAS tool kit was useful for guiding process, not overly prescriptive.
- Providing electronic copies of all information was useful for staff.

## Benefits:

- The self-evaluation process as a whole assisted MOSS to meet HAS, particularly as they relate to the evaluation component.
  - Coordinating group continually outlining benefits of being involved in the trial and strong link to MOSS strategic planning process.
  - Provided framework for MOSS strategic planning. (Note: MOSS was already undergoing this process and it was useful to have a system to guide this)
  - MOSS recently held a development and strategic planning day and the HAS information fed into this.
  - Decisions about MOSS direction had a context and were founded in how relevant they were to HAS. E.g. increasing consumer participation was linked to many HAS standards, particularly as they relate to evaluation.
  - Created a useful forum for cross-program and cross-site communication and idea sharing.
  - Provided a positive forum, constructive way for people to express grievances about agency processes and see actions being taken to address this. Gave all staff members a voice in agency direction. Therefore it reduced negativity across the agency.
  - Process allowed staff to see short-term outcomes.
  - Obtaining feedback from other agencies spurred other side benefits e.g. program awareness, improved communication and networking, positive promotion of MOSS in the wider community.
  - Process allowed staff to gain feedback on their work, provided a reflective process on work practice.
  - Gave staff a break from day-to-day casework.
  - The positive outcomes of HAS e.g. refining systems, improving communication etc. will ultimately provide time-saving benefits to MOSS in the future. A good example of this is that undergoing the evaluation process has assisted MOSS to meet particular standards.
  - The benefit of having different methodologies to gauge consumer feedback was that MOSS saw what worked well, and what did not, for future evaluations. Now have a framework.
  - Gave COM a greater understanding of the scope of work involved in the agency beyond casework.
- Good driver for change from both staff (e.g. OH&S) and management perspective (e.g. administrative systems).

## Issues:

- COM being volunteers: time, need, understanding
- HAS took a large proportion of agency time.
- What if no one had wanted to drive the process? No self-selecting coordinating group (i.e. management had little time to do this with other concurrent management duties including tender processes and staffing issues)
- Cost for consumer participation in interviews, forums etc.
- Wanting to explore different methodologies of obtaining information vs. trying to extract significant quantitative data from consumer and other services feedback (groups selected own methodology).
- Not having clear methodology around obtaining feedback from external agencies, selecting participants to survey.
- Different groups had different levels of motivation.
- Surveys given out to service users needed to be developed further to look at all meaningful aspects of service delivery.
- Some standards are more relevant for a larger agency.
- Working books usability was debated. Particularly, grouping together all points within one standard was seen to be too narrow. This also resulted in different levels of analysis and evaluation. If the working book was linked to each point within a standard, more in-depth feedback would have been provided.
- Within workbook, it was unclear as to whether we had completely / partially met a standard.

## **Process Undertaken by MOSS In Completing the HAS**

### **STEP 1 →**

Received relevant information and implementation pack from DHS

### **STEP 2 →**

Management discussed HAS process and our selection as a trial agency at an all agency meeting.

### **STEP 3 →**

Appointed coordinating group (Ian, Romy and management)

### **STEP 4 →**

Coordinating group developed a timeline for the agency to complete the process.

Please note that the timeline was designed to be flexible and changes to parts of the timeline occurred along the way, though the final completion date stayed the same. (See appendix 1)

### **STEP 5 →**

Agency meeting held at which point HAS process was discussed, timeline was distributed.

### **STEP 6 →**

Broke up into working groups each of which was given a standard to look at and identify requirements that MOSS had not met.

- There were 4 staff working groups, an admin group and management / Committee of Management (COM) group.
- working groups met weekly for 3 hours at a time and consisted of 4 staff members.
- Coordinating group ensured each group had a mix of genders and staff from different program areas across the agency and were available to clarify elements of the process.
- Time allocated for completion of the HAS workbook was extended due to feedback from groups.

Coordinating group visited MOSS COM to outline process. The COM group subsequently worked on their allocated standards at an arranged HAS allocated day.

### **STEP 7 →**

Once the workbooks had been completed and staff perceptions of the process recorded (included above in the list of benefits, issues etc.), staff were instructed to move onto 'stage 1b' of the evaluation process which included gauging the perceptions of other agencies and clients.

Working groups were divided as follows:

- one group focused on agencies MOSS commonly refer to
- one group focused on agencies MOSS commonly gets referrals from
- one group focused on getting feedback from SAAP clients
- one group focused on getting feedback from HACC and PSP clients

The specifics of getting feedback were left up to the different groups, however the example surveys were provided and agency discussion around remunerating clients occurred at agency meetings.

### **STEP 8 →**

The co-coordinating group (Ian and Romy) collated all tasks that came about from the workbooks and initially devised 3 documents to collate the workbook data.

(see appendix 2 - Note that for this stage there was no suggested methodology for collating workbook data into areas and so this working document was developed by the coordinating group. As such, this stage was the most difficult and time consuming – see further commentary in evaluation paper. As the coordinating group worked through collating the information, themes emerged that led to the above 8 areas for work.)

The 3 documents focused on:

- a) actions for process
- b) actions for documentation
- c) actions for evaluation

### **STEP 9 →**

The coordinating group roughly prioritised the tasks into 4 categories:

- a) Immediately possible
- b) High priority
- c) Medium Priority
- d) Low Priority

The co-coordinating group also found that the tasks lent themselves to form 8 themes of work that would need to be undertaken.

The areas that emerged were:

- a) Information
- b) policies and procedures
- c) evaluation
- d) service delivery
- e) sector development
- f) agency resources
- g) values and ethics
- h) strategic planning

**STEP 10 →**

The existing groups were each given 2 themes and their corresponding roughly prioritised list to look at in more detail and develop a 2-year timeline of tasks.

The coordinating group developed a workbook for each working group with the roughly prioritised tasks and outlining the process required (see appendix 3)

**STEP 11 →**

All timelines were analysed, and put into a number of excel spreadsheets depending on who would be responsible for which tasks.

(see appendix 4)

**STEP 12 →**

A list of high priority / immediately possible tasks drawn up for work to commence immediately (see appendix 5)

## **Attached Documents**

Appendix 1 – Step 3: timeline given to staff.

Appendix 2 – Step 8: a list of all actions coming from workbook self evaluation.

Appendix 3 – Step 10: workbook for each working group with the roughly prioritised tasks.

Appendix 4 – Step 11: collated excel spreadsheet timelines.

Appendix 5 – Step 12: Working Group specific lists of high priority / immediately possible tasks.

## Appendix 1

### STEP 3 →

#### Timeline Given To Staff

HACC and PSP standards were taken into account along the way so that this process did not need to occur more than once.

NB. This was made possible by:

- the mix a staff in each working group from different program funding streams
- use of HACC survey template in developing client feedback tool
- reviewing HACC standards when developing final task list to ensure a concurrent process

<b>Time allocated</b>	<b>Task</b>
Week 1	<b><u>Stage 1A</u></b> – Internal review using workbook provided for allocated standard
Week 2	
Week 3	
In between	Completion of workbook, document to be emailed to co-coordinating group Co-coordinating group to read through workbooks and ensure they are completed, suggest areas (if necessary) where groups can look into a standard further
Week 4	Plenary group to meet to identify commonalities / themes emerging between groups and prioritise gaps to focus on.
In between	Co-coordinating group to update Sue Plowright (DHS) on process so far, get feedback on use of workbook
Week 5	<b><u>Stage 1B</u></b> – External review for consumer and other agency feedback At this point groups will be allocated the following areas: 1) PSP / HACC consumer feedback 2) SAAP consumer feedback 3) Other agency feedback from people who refer to us 4) Other agency feedback from people we refer to Questions to address should include: who? How? How many people / services to involve? How to collate information into themes? (guidelines exist in HAS folder)
Week 6	
Week 7	
Week 8	
Week 9	
Week 10	
Week 11	Plenary group to meet to bring together both internal and external reviews and review thematic priorities for planning stage. Change composition of working groups (composition of working groups will change as of week 13, dependant upon people's areas of interest in the different themes)
In between	Co-coordinating group to feedback to Sue Plowright
Week 12	<b><u>Planning Stage</u></b> - new working groups working groups to compose a timeline of priorities within each theme. (E.g. group working on service accessibility may decide that priority number 1 is reviewing referral pathways, and that priority number 2 is making buildings disability accessible)
Week 13	

Week 14	Plenary group to meet to bring thematic timelines into one huge all inclusive timeline for the agency.
	COM discussion and ratification.

## Appendix 2

### STEP 8 →

A list of approximately 200 tasks were generated. Examples have been provided below.

#### **ACTIONS FOR DOCUMENTATION:**

##### **Section 1:**

- ❖ information in different languages
- ❖ large print material for those with impaired sight

##### **1.2**

- ❖ develop a client feedback tool

##### **1.3**

- ❖ Grievance policy to be ratified by COM and distributed widely

##### **Section 2:**

- ❖ Review Mission statement.

##### **2.2**

- ❖ Review Relevant Policies.

##### **2.3**

- ❖ All referrals to have E mail capability

##### **Section 4:**

- ❖ Each program has their own resources how can we centralise them and how can we ensure they are kept current? Could we use our internet site to store all relevant information and referral forms?

##### **4.2**

- ❖ Develop children's policy regarding office environment

##### **Section 5:**

- ❖ OHS policy to be completed

##### **5.2**

- ❖ Discussion around better accessibility to both sites

##### **Section 6:**

- ❖ Check mission statement to see if it reflects commitment to partnership

## **ACTIONS FOR EVALUATION:**

### **Section 1:**

- ❖ Regular client forums

#### **1.2**

- ❖ need processes in place before they can be evaluated

#### **1.3**

- ❖ A common client feedback tool to be devised and implemented

### **Section 2:**

- ❖ Review outcome monitoring process for referrals

#### **2.3**

- ❖ Follow up on referrals taken/not taken up

### **Section 4:**

- ❖ Document what we do in regard to evaluation etc

#### **4.2**

- ❖ Develop process to seek feedback through processes such as annual survey, during exit interviews when people leave the service, or through focus groups or meetings of groups of young people.

### **Section 5:**

- ❖ Develop audit systems

## **ACTIONS FOR PROCESSES:**

### **Section 1:**

- ❖ Training for use of interpreters, or part of orientation process (learn from other workers)

#### **1.2**

- ❖ inform staff and clients of available feedback tools, distribute widely

#### **1.3**

- ❖ Review of the Policy and Procedure Manual to be undertaken to ensure that it includes all up to date and relevant policies

### **Section 2:**

- ❖ investigate 'front-door' for whole of MOSS

#### **2.2**

- ❖ Review expectation of case plan meeting and explore best practice option

### **Section 4:**

#### **4.2**

- ❖ Use existing skills and knowledge for training purposes

### **Section 5:**

- ❖ Highlight elements of OHS policy in communal areas

### **Section 6:**

#### **6.2**

- ❖ Explore options for community partnerships (e.g. local council, St V's)

## Appendix 3

### STEP 10 →

#### Themes →

- 1) INFORMATION
- 2) POLICIES AND PROCEDURES
- 3) EVALUATION
- 4) SERVICE DELIVERY
- 5) SECTOR DEVELOPMENT
- 6) AGENCY RESOURCES
- 7) VALUE AND ETHICS
- 8) STRATEGIC PLANNING

#### Groups need to determine:

- budget / resources that would be required to implement the suggested action
- who would be the likely staff member responsible (e.g. Naomi as the 2IC, or a working group etc.)
- an estimated length of time it would take to implement each task
- a more detailed prioritisation of the tasks, from task 1 to 100 in order of what should be worked on first. (look to see what overlaps between MOSS priorities and external priorities. If things overlap they would be HIGH priority).
- Complete a time line (from task 1 to 100 for example) bearing in mind some tasks rely on others to be complete before they can commence (e.g. review all policies might be task 86, because it relies on assessing what policies need to be written, write them etc.)
- Consumer feedback should be weighted most highly when prioritising, as any change should be consumer driven. (if possible use spreadsheets of responses from dif working groups to see how prevalent a response was...the more common a response, the higher the priority)
- Good to place higher priority on service external feedback rather than internal, as ostensibly this is more objective.
- Small “Immediately possible tasks” to be either carried out by your particular group, or arranged to be implemented by your group (e.g. you instruct the relevant staff member)

Complete the following....(e.g. for policy group)

Task	Priority / when should it start?	Who is responsible	Cost / resources	Approximate time taken to Complete
New youth protocol policy	Medium. To commence in 6 months time (no.42)	Working groups	Time, Paper.	e.g. fortnightly working groups for 4 hours, over 6 months (8hrs per month)  <b>therefore...how many months?</b>

\* Note: tasks below are a sample of the tasks that working groups were asked to prioritise

## **INFORMATION**

### Service Feedback →

- services to be provided with clear programmatic information regarding specific entry points (pathways) and eligibility criteria
- information about team case management to be developed in a creative and user-friendly way (e.g. pamphlets / calendar with each month having specific info....Jan: team case management, feb: what are your rights, march: info about CRP & entry points. April: privacy at MOSS, May: grievance procedure, june: info about TOST & entry points, july: info about PSP & entry points, august: info about CCP & entry points, September: info about HSAP & entry points, October: MOSS history, November: crisis phone numbers, December:???...for example)
- Need a website to disseminate info. - arrange a website launch and invite services

### High Priority:

- ❖ source and distribute the Council to Homeless Persons charter of rights
- ❖ Complete and Put –up Website

### Medium Priority:

- ❖ Agency, policy and procedural information in different languages

### Low Priority:

- ❖ Review client info Packages

### Immediately Possible:

- ❖ Ensure all appropriate posters to be displayed in client areas

## POLICIES AND PROCEDURES

### Client Feedback →

- clients are interested in joining COM...policy around this.

### Service Feedback →

- develop procedure about co-case management. Agencies felt that there was 'MOSS ownership' and they did not receive enough feedback.

### **High Priority:**

- ❖ Clear internal protocols for MOSS programs (how they refer to one another etc.)

### **Medium Priority:**

- ❖ Review all policies for relevancy, legal requirements & HAS requirements

### **Low Priority:**

- ❖ Document how we advertise jobs – including internet options.

### **Immediately Possible:**

- ❖ re-format and update MOSS policy “consumer rights and responsibilities”...display in prominent positions within agency

## EVALUATION

### **High Priority:**

- ❖ develop effective and relevant consumer feedback methodologies

### **Medium Priority:**

- ❖ develop a client feedback tool

### **Low Priority:**

- ❖ Link central training database to staff files.

### **Immediately Possible:**

- ❖ File audits to commence and be carried out by someone external to team

## SERVICE DELIVERY

### Client Feedback →

- copy of case plan to be provided to all clients
- more post exit support / follow up requested by clients
- more formal exit where progress is discussed
- more client autonomy in case plan
- written info. to be explained verbally
- use other language, not 'jargon' or explain terminology clearly (e.g. case plan -the actions that we'll take to address this issue)

### High Priority:

- ❖ clarify screening process at agency level

### Medium Priority:

- ❖ Disability access needs to be improved

### Low Priority:

- ❖ Review position descriptions and remuneration

### Immediately Possible:

- ❖ Install On-Hold facility for telephone system.

## SECTOR DEVELOPMENT

### Service Feedback →

- programs have a desire for protocols. Explore which agencies would like protocols, what these would entail, formalise, have written document and keep in centralized protocol file (e.g. scan into computer and keep all protocols in folder on the server)
- Fed back that there were problems with our entry points (NEHS). Discussion re: developing better relationships with NEHS, secondary consultations? Developing a new entry point? Written procedure for all MOSS entry points to follow??
- Indigenous agencies would like management to management protocols

### High Priority:

- \* Review inter agency protocols now & yearly - other options? (who with, what to entail)

### Medium Priority:

- ❖ Develop calendar of sector activities (networks) and ensure all staff have equitable access to networks of interest.

### Immediately Possible:

- ❖ Participation in Sector development initiatives

## **AGENCY RESOURCES**

### **High Priority:**

- ❖ Systemise getting technical support.

### **Medium Priority:**

- ❖ develop a tool for identifying training and development needs of committee members.

### **Low Priority:**

- ❖ Cash flow projections – discussion with COM and Teams

### **Immediately Possible:**

- ❖ Develop central register of car servicing schedules.

## **VALUES AND ETHICS**

### **High Priority:**

- ❖ Implement an ethical framework for -
  - evaluation / research? E.g. payment of clients for involvement: when? How? Etc.
  - accepting gifts

### **Immediately Possible:**

- ❖ Agency to have a value discussion and make decision on issues such as:
  - working with perpetrators

## **STRATEGIC PLANNING**

### **High Priority:**

- ❖ We need to consider how we incorporate service user's participation in the agency and how we view them as an agency.

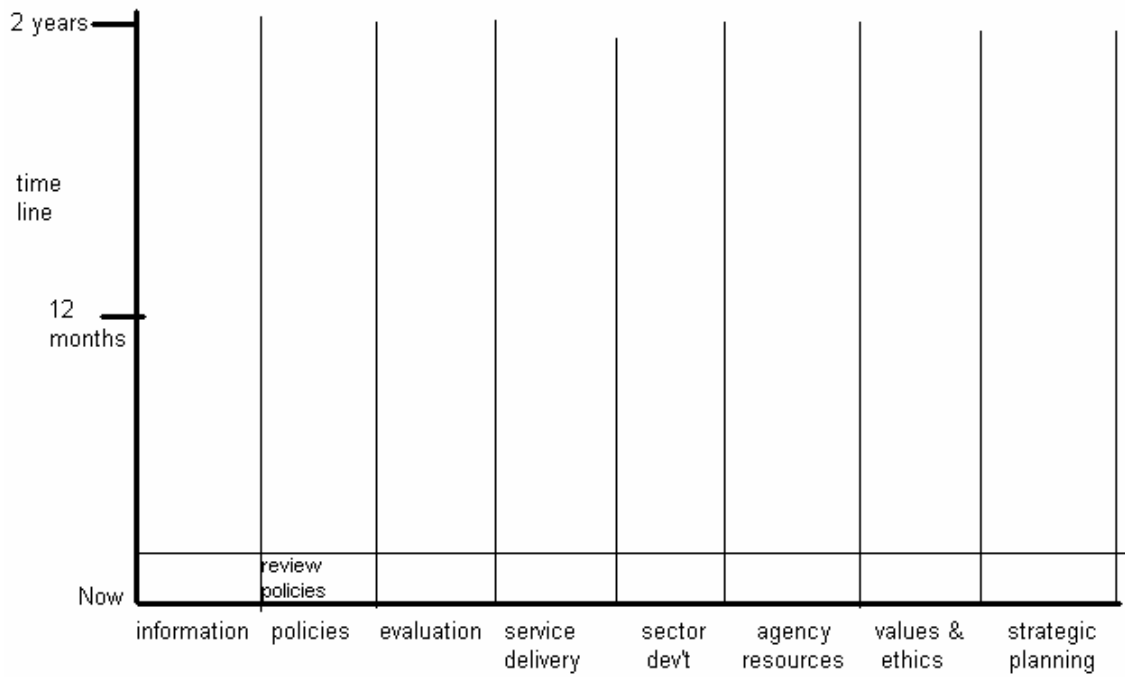
### **Medium Priority:**

- ❖ Ensuring consistent model of service-delivery, training, evaluation etc. across teams where appropriate

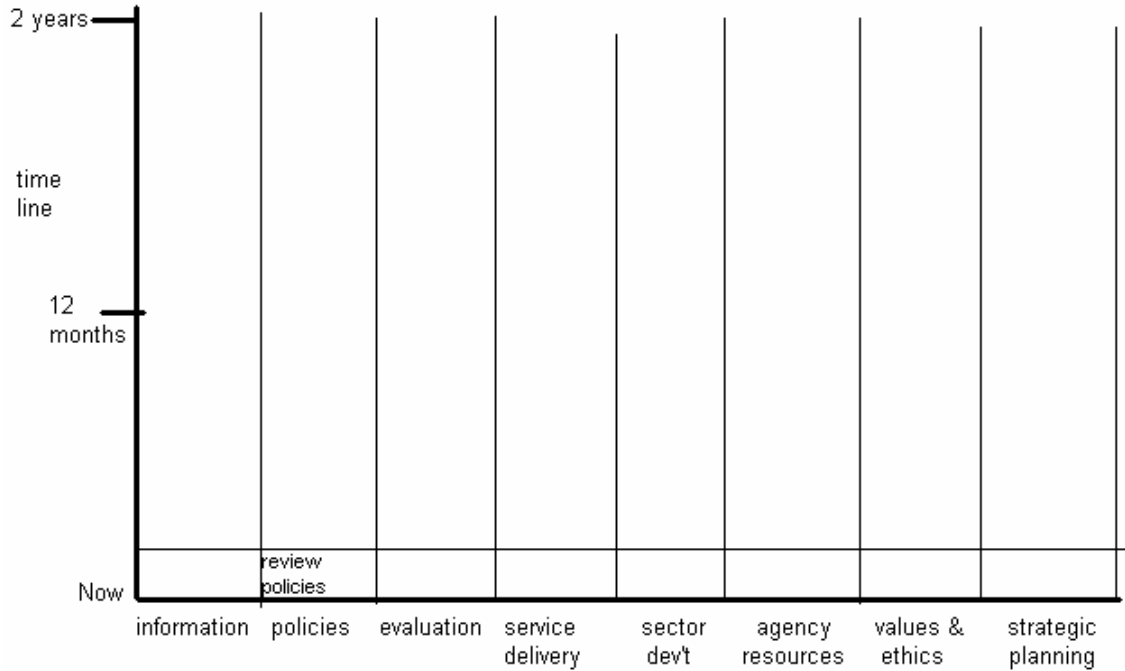
### **Immediately Possible:**

- ❖ Revisit strategic plan re community education – is it in our plan

### Tasks for working groups:



### Tasks for others (e.g. Rob, Naomi):



## Appendix 4

### STEP 11 →

Excel spreadsheets were used to create timelines over a 2 year timeframe. A different timeline was created for each of the following staff groups responsible for completing the task:

- Management (example included)
- Occupational Health and Safety group
- Program area teams
- Working groups
- Administrative staff
- All of Agency Planning Day
- Committee of management

