

# Case Study - Organisational change through learning and development

The case study provided here describes the

- Story of an organisation that went down the “learning culture” path
- Experience for staff, management, people who use the service

## The organisation

Jackie Kelly is the Manager of Services and Support at EAST, Eastern Access Community Health in Ringwood. The service runs day programs for more than seventy people with a disability.

## Issues for the organisation

Two years ago she undertook a review of the services that the organisation was providing. She found there were a number of problems and gaps:

- Talent and ability of the experienced staff was being under-utilised
- Team leaders were sitting behind computers working out rosters and bus timetables, not focusing on clients
- Less experienced staff were out in community locations, unsupported and isolated
- The clients of the service were not receiving the quality of service that was possible with the resources available
- The funding model meant that all clients in the programs were obliged to attend all day, five days a week whether this suited their needs and wishes or not
- Real community participation was not being achieved

Overall, Jackie could see that a restructure was required. But this could not just be a restructure of how funding was organised, or programs managed, there was a need for everyone within the organisation to start thinking differently about how they did their work.

## Developing a learning culture

Adopting Person centred approaches was seen as a way that could bring about positive change. For this to work, everyone involved in the organisation had to have the opportunity to become part of the learning culture. They needed to be offered the chance to learn about person centred approaches. The whole of the organisation needed to be included for it to work. Person centred approaches involve careful listening. Listening to:

- the clients of the service
- their families
- volunteers
- the paid workers.

To encourage a successful change the processes need to be open and available to everyone to understand and participate in.

## Training in Person centred thinking

The learning and development was started with Sherrie Anderson from Person Centred Learning Services providing two full days of Person centred thinking. This is workshop style training that gives the participants the experience and tools to think from a person-centred viewpoint and adopt person centred approaches. All staff from the disability group including administrative staff, finance staff, team leaders, support workers and

volunteers took part in the training. This created a general positive atmosphere and excitement. Jackie did not want to lose this enthusiasm so then adopted an approach of having ongoing training, and mentoring. A consultancy with Sherrie Anderson was established for a year so that she came to EACH at least once a month to help and guide them with the changes and the implementation of the learning.

## **Finding direction**

The aim of the restructure was all about asking people what they want and developing services from that. Once the staff were in a position where they could put their learning about person centred thinking in place, it was time for the whole population of the organisation to be involved in working out where they wanted to go and what they wanted to achieve.

Holding a PATH day, two months after the initial training did this. . A PATH is a tool of person centred planning that can provide the opportunity for an organisation to set its goals. The people involved included clients of the service, their families, support workers, supervisors, managers, the administrative and finance workers and volunteers.

The facilitator encourages everyone to speak and listen. A record is kept that shows where the organisation wants to get to, and what they need to do to get there. EACH had forty people present at the PATH. This included individual clients, family members of clients, staff and volunteers.

The major steps involved in a PATH are as follow: (adapted from [www.helensandersonassociates.co.uk](http://www.helensandersonassociates.co.uk))

*"Path is a way for diverse people, who share a common problem or situation to align...their purposes...their understanding of their situation and its possibilities for hopeful action...their action for change, mutual support, personal and team development and learning."* - Jack Pearpoint, John O'Brien and Marsha Forest

### **Step 1: The dream**

The facilitator asks the people of the organisation to describe their vision for the future. There is graphic recording of this.

### **Step 2: Sensing the goal**

The next step demands that participants imagine that a year has passed and that they are back in the same room recollecting what has happened. They tell the facilitators what it is like to live in a better future, what events have taken place and what they have done to make the dream more of a reality. There are two rules to this stage - all goals recorded have to be both positive and possible.

### **Step 3: Now**

Step 3 examines the situation now and analyses the tension between where the group is now and where they want to be in a year's time. It is this tension that gives energy and dynamism to the process.

### **Step 4: Enrol/Who's on Board?**

None of the goals are achievable by any person working on their own. Step 4 looks at who needs to help. This could be people at the meeting but also those who are not present. Sometimes there are people who could stand in the way of the goals. Their names are recorded so that a strategy can be developed for winning them over.

Step 5 How are we going to build strength? This can sometimes be a very important step in identifying what the group will need to do in order to maintain strength and commitment to the goals. It can sometimes be as simple as meeting regularly and supporting each other by phone. Sometimes it means acknowledging and changing destructive patterns in the group.

## Step 6: Three/six month goals

The facilitator asks the group to pick a date within the next year, normally either three or six months later, and to set interim goals.

## Step 7: First Steps

First steps are identified and the date for another meeting set.

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## Observed changes in clients

Jackie was amazed at the results of just a couple of months of person centred approaches in action brought about. In the past the program participants had often been very quiet, with some people who rarely or never spoke except for Yes or No types of answers to questions. This situation had probably arisen because people had not been actively encouraged to talk. However; all of that was quite different at the PATH day.

Program participants really spoke up. One person with an acquired brain injury spoke to the whole group and said "You need to listen to me and do what I want." Another chap who rarely talked spoke up for himself and said "I want to be with him. We don't want to be separated." Another client who is blind, quietly asked for rights and quality.

The staff were really excited at these examples of observable change in their clients. They saw these changes as directly attributable to the person centred approaches that all staff had adopted.

## Changes to the organisation

Many practical changes have been implemented as part of the learning culture that has been established:

- A name change for the organisation, from EACH Disability Service to EACH Community Inclusion and Support Service
- Team leaders have been moved from behind computers to back out into programs where there experience and leadership is most required
- The focus of the entire staff has been redirected back onto clients via person centred thinking
- Programs are not going to be run in halls out in the community any longer, but participants will be assisted to take part in community run programs
- The buses are being phased out so that clients will travel more independently using public transport and taxis, and smaller vehicles will be operated by EACH
- A creative approach to overcoming the challenges of funding has been adopted
- A community development worker has been employed to make genuine links into the community. This was essential to make genuine links in the community. For such changes to occur a person needs to be given paid time and resources to explore the community, find options, make links and drive the connection.
- Focus group have been established to provide the opportunity for a number of clients of the service to meet and talk about options for activities in the community
- Surveys were sent out to clients by the focus group to work out what people would like to do or try
- A calendar of events has been set up by the focus group to trial for 12 weeks
- Planning for programs for 2007 will be based entirely upon client wants as established through the focus group and survey results

## Challenges

- **Staff attitude**  
One of the biggest challenges for this organisation going down the path of change has been staff resistance. Some staff have left the organisation, which has provided opportunities for new people to become involved.
- **Maintaining enthusiasm**  
After the initial training and then the PATH day, enthusiasm was very high. Jackie sees that keeping up this enthusiasm is going to be a challenge, as it is natural for excitement to die off. A lot of what is being done is “common sense, but hard to implement”. Mentoring is being trialed as the way to help keep up enthusiasm. Workers have also agreed to be videoed on some occasions. They can look at how they work with a mentor and try to learn from this.
- **Celebration of success**  
Jackie is also aware that we “need to celebrate success of good practice”, that celebrating is a way to encourage further learning and efforts and she and her team are looking at ways to do this.

## The future

This organisation wants to further develop its learning culture. Plans exist for providing further training in positive and productive meetings and Person centred team approach. While there isn't any doubt that options and life choices for clients have really improved, EACH would like to introduce Quality of Life Measures, to formally keep track of this.

EACH is also currently involved in an ongoing DHS project that is looking at case studies that show how people have been linked into the community.

Person centred planning will also follow.

Person centred planning is a way to develop personal support plans with a client so that everything that is important to them and for them is captured in a way that everyone can work to. Dreams and hopes of what people want to happen in their lives are documented along with what must happen for someone's safety and comfort.

Jackie feels that it has been important to change the organisation first and then introduce person centred plans. She asks how can people be expected to make choices when they haven't yet got used to being informed or knowing what is out in the community for them to make choices about

EACH also plans to adopt the Active Support Model and train its support workers in this way of providing support. Active Support is about increasing the involvement of people with a disability in their every day life activities. It involves training staff to participate effectively in this, to record activities and the individual's involvement in them and to assist the person to increase their involvement. It is about increasing people's abilities and enjoyment in life. The Active Support Model and Person Centred Planning work well together. It enables planning of support to be developed with the person, and involves describing to the support worker exactly how they should deliver the support.

## Links

- **DISTSS Case Study for Active Support Model** - [http://www.distss.org.au/training\\_resources/case\\_studies/active\\_support.html](http://www.distss.org.au/training_resources/case_studies/active_support.html)
- The National Centre for Vocational Education Research is Australia's principal provider of vocational education and training (VET) research and statistics. There are two articles available on their website relating directly to learning cultures: **What makes for good workplace learning? At a glance** - <http://www.ncver.edu.au/research/core/cp0207e.htm> and **Case studies of organisations with established learning cultures** - <http://www.ncver.edu.au/research/proj/nr9014e.htm>
- Information on Learning cultures at [www.training.com.au](http://www.training.com.au). Type “learning culture” into the search engine on the first page and follow the links for creating a learning culture: advantages of a learning culture

- what is a learning culture?
- achieving a learning culture
- VET and continuous learning
- motivate your staff
- case studies
- tools and tips
- Learning organisations, definitions and meaning at [www.infed.org/biblio/learning-organization](http://www.infed.org/biblio/learning-organization)
- Person centred approaches:
  - Person Centred Learning Centre at EW Tipping foundation – a not for profit organisation that provides training, resources etc - [www.pcls.org.au](http://www.pcls.org.au)
  - Helen Sanderson and Associates – a development agency exploring how person centred planning can contribute to changing lives, organisations and communities found at [www.helensandersonassociates.co.uk](http://www.helensandersonassociates.co.uk)
  - An inclusive overview of Person centred planning and thinking is provided by Helen Sanderson in her Person Centred Planning: Key features and Approaches (2000) found at [www.familiesleadingplanning.co.uk/Document](http://www.familiesleadingplanning.co.uk/Document)