



Secrets to Success

Fostering a Client-Centric Culture

Notes from virtual round table held on Thursday 18 May 2023

Discussion with Maree Kalkens and Evaline Keves - Uniting VicTas

Introduction and purpose

Approximately 30 people from several community services organisations attended the virtual round table hosted on Zoom. The purpose of the session was to learn from Uniting VicTas' experience in hearing and understanding the voice of their consumers. Maree Kalkens (Senior Manager Quality Improvement and Performance) and Evaline Keves (Quality Improvement Business Partner) gave insight into the challenges Uniting faced, what they did and what lessons they have learned.

Uniting's context and challenges

Uniting is one of Australia's largest community service providers and is the product of 24 organisations that came together 5 years ago. With around 7,000 staff and volunteers employed, they deliver services that span from early childhood education to home and carer services across about 240 locations.

Uniting engaged Insync to help develop and implement a survey to better understand the voice of their consumers. This was the first time Uniting had undertaken a project of this scale, incorporating almost all services across the whole of Uniting to understand their consumers and the experience they were having with the different services offered. Whilst they had pockets of the organisation embarking on understanding consumers in their specific programs, there was no consistency in the questions, what they were learning from the surveys themselves or the process of how that data was filtered into improving service delivery.

What did Uniting do to understand the consumer experience?

To understand the consumer experience, Uniting knew they had to heavily involve the consumers themselves, those who had recently utilised one of the Uniting services to see if they were meeting the needs and expectations they had. They wanted consumers to draw on their recent experience to help them identify how they could improve. This genuine partnership with consumers started early on in the piece during the design phase when consumers were invited to three working groups to flesh out what is important to them and what resonates with them. Inclusiveness is important at Uniting so they wanted people to feel the survey was about them and to drive up participation.

Uniting started with their values and their internal excellence framework which underpins all they do; this was used to form the base of the survey. If they were delivering an excellent service, what would that look like to the consumers? They turned those values into statements and questions.

Once initial consultation with the consumer group had begun, the survey design was fleshed out, built by Insync and launched to all consumers through a variety of methods (email invite, QR codes, paper forms etc.) across almost all locations.

How did Uniting do this on such a broad scale?

Uniting started by obtaining strong support from their board and executive team, ensuring their full endorsement for high-level buy-in. They produced a paper on why this work was important and what could be gained from it. This paper went through various levels within the organisation and a lot of consultation. The buy-in from all levels was imperative. They also wanted to engage across all teams, across the whole organisation and bring all the service areas along on the journey, and that consultation helped.

Secondly, they knew it would only be a high level of data (at an organisational level), but it would then allow them to go deeper internally when they understood where to go from the results.

They also noted, with such a large organisation covering a broad spectrum of services, it was important to understand that all not consumers were their own decision-makers. When a carer was involved or a decision maker involved, they were invited to complete the survey. People who had experience personally were invited to participate also. They also had to work out what services were to be deemed out of scope. Services for young people were excluded from the first survey but Uniting will survey this group in the future. Promotion of the survey was also key. Uniting focused heavily on promoting the survey and the importance of hearing from consumers through internal promotion at various service points, running communications right up until the go-live date, having a prize draw to bolster interest and response rate and providing staff with FAQs to help answer any question consumers may have.

What results have Uniting achieved?

Uniting received very positive feedback from their consumers. Using the demographic splits they have been able to pinpoint areas where further attention is needed and compare results back to an overall organisation level. It has helped them to understand all the different pockets of the organisation and create a baseline.

Uniting is very values-based, referencing them constantly internally and externally. The values are part of Uniting's fabric. Uniting was pleased to see how well their values aligned with consumer perceptions. It was reflected through the data such as people saying they felt safe to be who they are. Having the results has also really helped to build Uniting's staff's awareness of the importance of certain delivery aspects and capacity in service delivery.

What are the main lessons to share with others?

Having consumers involved in the design process, not just consulting but truly partnering with consumers throughout the entire process enabled Uniting to create a survey that was truly reflective of what elements of service delivery are important to consumers. It also allowed them to create an inclusive survey that represented all consumers, not just some. This gave them the best chance at achieving the best possible response rate as the survey appealed to all.

Further, Uniting suggests considering how you structure the survey as it will have an impact on your response rate. Uniting experienced a higher-than-expected dropout rate which occurred at the demographic questions section at the beginning of the survey. Being such an inclusive organisation, they wanted to ensure they could capture everything for everyone that accesses Uniting's services. Next time they have noted they will put some of these demographics at the end of the survey while keeping the key ones at the start. In having all the demographics at the start of the survey, they acknowledge they may have missed out on information from people who dropped out.



What are the main lessons to share with others? continued.

Think about having mandatory vs non-mandatory items and questions. This year Uniting made the survey non-mandatory across all demographics, items and questions, this is something they will look to reconsider next year as it meant there were differences in the number of responses to questions.

Promotion is key. Almost the biggest part of it. Regular targeted communications in lots of different ways, will be invaluable in terms of the buy-in. Communication is key. Communicate in lots of different ways and start early so there is a lot of lead time.

How did Uniting get the results out to such a large group?

Uniting started at a high level when it came to sharing the findings of the survey, working their way through executive down to divisions. They helped groups to interpret results by developing one page infographics which gave them a high-level snapshot of the data: demographics, results of quality of service and NPS. Building interest with these snapshots and getting people interested helped. They then created further reports that were more detailed at the next level, cascading right down to program level. Along the way, they have been working with the senior leaders, really engaging with them to try and understand their individual information, what it means and where to go from here, and how best to share with their teams and engage their team with the data.

In enabling teams to understand the interactive reporting portal they created a user guide, which helped employees to jump in and look at their own specific data and understand it. Uniting also worked with them to help feed results into quality improvement plans and how to work on those before the next survey, so that people can see the impact of their actions.

Closing the loop with the consumer group was also critical. Post survey they sat down with them to go through the results and not only gather their feedback on them but the overall process also.

What are the drivers of a positive client experience at Uniting?

Uniting has invested heavily in ensuring the consumer's voice is at the heart of service delivery and enabling their people to do this through good systems and processes. Uniting has made the desired consumer experience very clear in organisational values and in their Excellence Framework. The culture shift has taken a long time but now Uniting is starting to see the benefits of that work.

The culture of the organisation is another driver, the board and senior leaders are very committed to this process and supported it in several ways. Uniting fund a consumer partnership team who are fully focused on ensuring meaningful partnership activities; where they work together with consumers on improving the consumer experience. Uniting employs people with lived experience so that they have a deep appreciation of the challenges being faced by consumers. Consumer partnering is deeply embedded in Uniting's ethos. Uniting now reports metrics on consumer partnering and presents to the board on this also.

Uniting is committed to gathering consumer feedback and acting on it. Uniting is planning to run this process every couple of years to ensure they keep on the pulse of the consumer experience.

