



The CS&H Industry Skills Council
Inaugural Conference

Making a Difference...

Tuesday 7th and Wednesday 8th June
Australian Technology Park Sydney

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Theme

Utilising Funding Efficiently

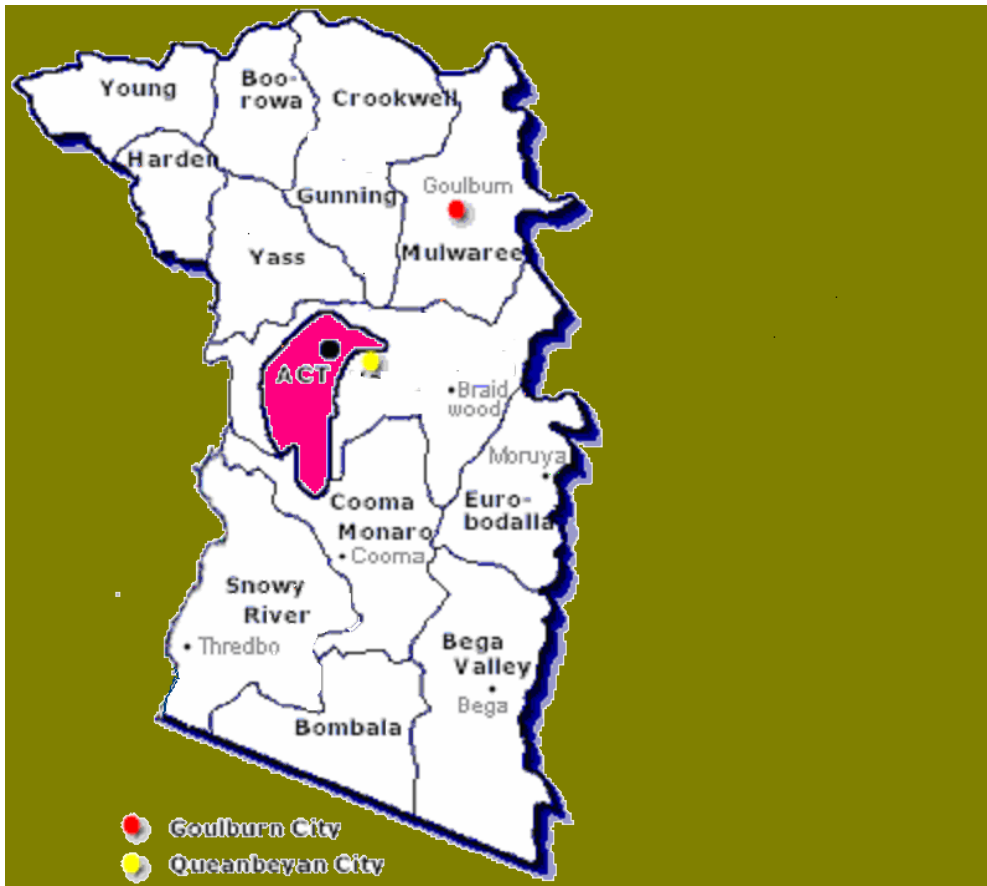
Session Title

**Making a Regional Difference – Case management training
across thirteen local government areas in southern NSW**

Paper

BACKGROUND

In 2002/03 the Regional HACC (Home and Community Care) Development Project auspiced by Queanbeyan Council, received funding from the Department Ageing, Disability and Home Care to provide training for HACC services across the 13 local government areas of the Southern Region. (*Overhead 1 map*)



Prior to 2002 training opportunities were limited and ad hoc within the region with service providers being limited to one off training days provided by city based providers and limited opportunities through the TAFE system.

Within the Southern Region various auspices receive HACC funding to deliver home based services for the frail aged, people with disabilities and their carers. These auspices include other government departments (Health and Transport), Local Government Non Government Providers and For Profit Organisations. These services have their base in the following towns:

- Young
- Harden
- Boorowa
- Yass
- Crookwell
- Gunning
- Goulburn
- Queanbeyan
- Braidwood
- Moruya
- Narooma
- Bega
- Merimbula
- Berridale

- Cooma
- Bombala

In the first step in the training project all services, staff and committees were surveyed to determine what service providers saw as their training needs. Services were asked to place in order of priority specific broad learning streams based around service delivery, management and personal development. They were then asked questions relating to:

- what would influence them to register
- what method of training would be the most effective
- which venues (area) would be attended
- how much would they be willing to pay
- what would be the impediments that would prevent attendance to training
(overhead 2)

From this survey a training plan (overhead 3) was developed taking into account the training needs of service providers, geography, length of sessions, methods and conflicting work issues for service providers. Consideration also needed to be given to venue choice in order to provide equitable access to any training provided.

In the initial training plan the following subjects were covered as 1 day sessions at venues that reduced the travelling time required by participants. As the aim was to deliver only accredited training a partnership was developed at this stage between Bushjac Consulting, TRAHCS (as the RTO) and the project to deliver Community Services Cat 3 units.

- Assessment of People With Complex Needs- CHCCS6A
 - April 03 60 participants
- Recruit and Train Volunteers- CHCORG25A
 - June 03 22 participants
- Working Within a Legal and Ethical Framework CHCCOM2A
 - June 03 21 participants
- Occupational Health and Safety 2 days SAFETYWORKS
 - October 03 12 participants
- Strategic Planning CHCORG13B
 - November 03 29 participants
- Advocacy Information Sessions TARS
 - March 04 6 sessions
- Health Records and Information Privacy Act 2002 PRIVACY NSW
 - September 04 38 participants
- Minimum Data Set Refresher AGE
COMMUNICATION
 - September 04 31 participants

The delivery of these units and other sessions cost \$15, 233 (61%) of the training budget of \$25000.

Case Management- In the Beginning

In April 2004 three services (Snowy River, Cooma and Yass) received extended funding for their Multi Service Outlets to expand their services to include Case Management. At the same time staff turnover was occurring in other services across the region. As Case Management was part of the original plan and had yet to be

delivered discussion occurred between the training project and the consultant on ways to deliver case management training that:

- Was meaningful and would meet the need of new and existing HACC service providers as well as those related providers funded through other programs
- Was accredited
- Would legitimise the skills of current service providers and provide support and skills for the new services
- Was relevant and would apply to the workplace
- Was accessible and take into account the regional geography
- Was delivered in a flexible manner taking into account participants work situations
- Would improve the quality of case management services for people with disabilities, the frail aged and the carers of those people and was,
- Cost effective

The decision was made to deliver the Diploma of Community Services Case Management CHC50902

Case Management- How we did it!

- **The Budget**
 - With only 39% (\$9767) of the DADHC funding grant HACC providers were charged a small fee of \$35- \$65 per day and non HACC funded participants were charged full cost recovery approx \$95 per session. Fees from participants raised \$13,690 – enabling catering and venue costs to be met as well as some of the cost towards the training. (*Overhead*) Participants had a choice of paying by cheque, by cash or to be invoiced thus allowing for different services' accounting processes.
- **Venues:**
 - In order to limit travel by any participant venues were chosen within 2.5 hours radius of service outlets. Based on the makeup of the groups training was held in Queanbeyan, Yass Batemans Bay and Narooma. Venues were chosen for their cost, physical comfort, catering, facilities and accessibility. Venue hire varied between (\$75- \$350) and catering costs varied \$10 - \$25 per head. (*overhead*)
- **Information**
 - HACC, Health, Disability and Community Aged Care Package service providers were given information by email and post regarding course content, costs and venue and were asked to register. Priority for attendance was given to HACC funded services. The course was also promoted through regional and local forums and through newsletters.

The Training Challenge

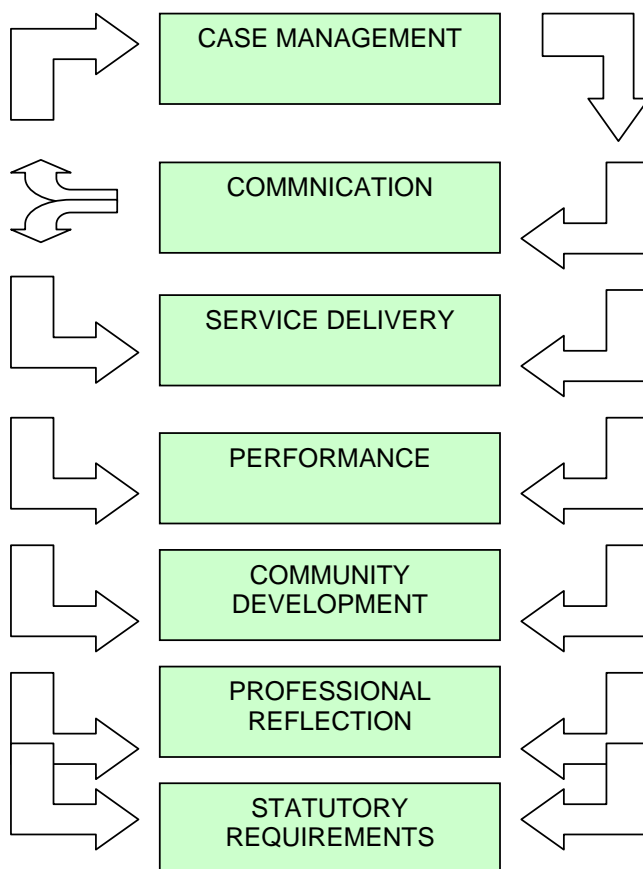
The Diploma of Community Services (Case Management) consists of sixteen units of competency. Thirteen of these units are compulsory and there are three elective

units. The challenge was to address the skill, knowledge and value (SKV) requirements for all sixteen units of competency with minimal face to face learning opportunities.

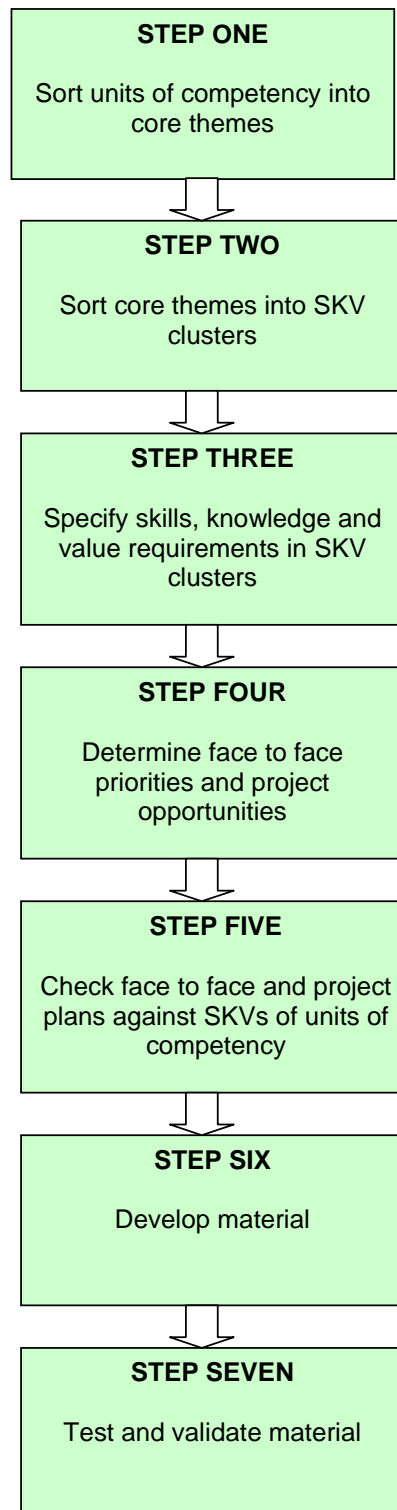
The key to this challenge was to sort the units of competency into core themes. Seven core themes were identified:

- Case management practice
- Communication
- Service delivery
- Performance in the workforce
- Community development
- Professional reflection and development
- Statutory requirements

Whilst seven core themes were identified it is important to note that case management practice and communication infiltrated each core theme.



This was the first of seven steps of content development. The seven steps were:



- **For example – Step Two**

The Performance theme consists of nine SKV clusters, drawn from:

- CHCORG6B Co-ordinate the work environment
- CHCORG9B Manage projects and strategies
- CHCORG11B Lead and develop others

Working to achieve desired work outcomes

SKV cluster name	Performance Criteria
Planning	<p>Needs analysis CHCORG6B 1.2, 4.2</p> <p>Project/strategy planning CHCORG9B 1.1, 1.2., 1.3, 2.2, 2.3, 2.4, 2.5</p> <p>Budget CHCORG9B 5.4</p>
Monitoring/managing work performance/outcomes	<p>Participatory work force CHCORG6B 1.3, 1.7 CHCORG9B 4.3 CHCORG11B 3.2</p> <p>Clear expectations/goals CHCORG6B 1.5, 1.8, 3.1 CHCORG9B 5.1, 5.2 CHCORG11B 1.1, 3.1</p> <p>Training and development CHCORG6B 1.6 CHCORG9B 4.6 CHCORG11B 3.4, 3.6</p> <p>Managing unsatisfactory performance/conflict CHCORG6B 2.2, 2.3, 2.4 CHCORG9B 4.4, 4.5 CHCORG11B 3.3, 4.4, 5.1, 5.2, 5.3, 5.4, 5.6, 6.1, 6.2, 6.3, 6.4, 6.5</p> <p>Monitor performance/feedback/review CHCORG6B 13.2, 3.3 CHCORG9B 5.4, 5.7 CHCORG11B 2.2, 2.4, 4.1, 4.2, 4.3, 4.5</p> <p>Cooperative practices CHCORG6B 1.3, 1.9 CHCORG11B 4.6, 4.7</p>
General communication skills (to be considered in conjunction with the communication theme)	<p>CHCORG6B 3.1, 3.2, 3.3 CHCORG11B 3.1</p>

Own performance and well being (to be picked up in professional reflection)	CHCORG6B 1.1, 1.10 CHCORG11B 1.3, 2.5
Risk management	CHCORG9B 5.5 CHCORG11B 2.2
Resource management	CHCORG9B 3.1, 3.2, 3.3, 3.4, 4.2
Research and innovation	CHCORG9B 2.1 CHCORG11B 1.2
Promotion	CHCORG9B 4.1, 4.2
Statutory obligation	CHCORG6B 5.1, 5.2, 5.3, 5.4, 4.1 CHCORG9B 5.6 CHCORG11B 2.3

The analysis shows that the:

- SKVs around own performance and well being could be picked up in the Professional Reflection and Development theme; and
- SKVs for communication needed consideration with the Communication theme.

For example – Step Three

Participation in the workplace/projects

Knowledge	Skills	Values
<ul style="list-style-type: none"> • Organisational policies and procedures • Relevant legislation • Safety requirements • Industrial relations conditions and requirements • Business and strategic planning processes • Project management processes 	<ul style="list-style-type: none"> • Identify relevant people to include • Facilitate the involvement of others • Listening • Questioning • Negotiation • Positive feedback • Group processes • Meeting skills • Project planning • Business and strategic planning 	<ul style="list-style-type: none"> • Input from others is positive and valued • Implementation will be smoother if people are involved

At this stage the KSVs were cross referenced to the Units of Competency. In this case there have been more skills identified than appear in the Units of Competency. When this process was completed for all six themes, a clear picture of SKV overlap became very apparent. This informed the development of material to facilitate learning and project work.

- **For example – Steps Four, Five and Six**

A number of skills appeared across most themes. Accordingly, listening, questioning, positive feedback, negotiation and group processes were introduced in the first face to face session, then practiced and refined in subsequent sessions. There is no doubt that the repetition of these key communication skills produced excellent outcomes.

The analysis (at Step Three) also enabled the construction of assessment material that involved parts of a number of themes. An example is the Project Planning assessment task that included a demonstration of knowledge and skills from the case management, performance and statutory requirements themes by requiring a plan to develop an integrative approach to case management in the learner's operational region. The associated risk analysis encompassed parts from the communication and performance themes.

The analysis also provided direction for the development of problem based learning tasks eg using a process to sort, prioritise, plan and monitor requirements of clients with complex needs. This problem solving task encompassed knowledge and skills from four of core themes: case management, communication, performance and service delivery.

- **Summary of the process**

There is no doubt that the analysis and mapping process described in Steps One to Five is pedantic and time consuming. However, the benefits have proven to be significant, including:

- Providing a guide for the development of material to facilitate learning in a limited face to face context;
- Providing a guide to maximise the assessment capacity of projects; and
- Providing a thorough record of accountability for AQTF purposes.

The pedantic analysis of SKVs was not the only factor that made the delivery and assessment possible within the financial and geographical constraints. Two other factors played a key role:

- The people involved were all very experienced workers in the community sector; and
- An electronic interactive mechanism was introduced as a learning medium.

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Using the Internet **Session 6 (overheads)**

- To complete the unit on Professional Development a group was set up through Google. As most participants had not used groups previously some difficulty was experienced initially in setting up. Problems were experienced at an individual level with registering and firewalls within large organisations prevented access. Once set up and participants became familiar with the process, using google proved to be a cost effective way in which to deliver the unit and to observe participants progression.



- Participants were asked to respond to two relevant papers (The DADHC Review of Case Management Services (terms of reference) and the Australian Governments Reform Paper for Community Care “The Way Forward”). Following their responses they were asked to question others on their response, review their own answers, re- respond and then comment positively on responses provided by others.

Outcomes

- **Unit Evaluation** (overhead)
 - After each session participants were asked to complete an evaluation form that considered presentation, comfort and communication. The chart below analyses and averages the responses based on a 0-5 response. Comments and responses made regarding comfort were acted upon and in some instances resulted in a venue and catering change.

	session 1/2	session 3	session 4	session 5	session 7
Relevance of content	4.2	4.1	4.3	4.3	4.9
Quality of Delivery	4.3	4.3	4.3	5	4.5
Pace of workshop	3.4	3.5	4.1	4.2	4.1
Level of Learning	3.9	4.0	4.0	4.0	4.2
Appropriateness of activities	4.1	3.9	4.0	4.1	4.3
reflective of content	4.1	4.2	4.4	4.5	4.5
timely	4.0	3.9	4.3	4.4	4.3
sufficient information	4.2	4.1	4.3	4.3	4.4

- **Participation levels**
 - The table below shows the participant rate per session. Thirty two service participants chose to access a single block of units to meet their needs and not to complete the whole course, and a further 4 withdrew before graduation.

SESSION NO	PARTICIPANTS
1-2	46
3	46
4	45
5	41
6	32
7	33

- 30 participants have completed the requirements for qualification

LGA	Service Type	Service Auspice	Funding Source
Bega	Case Management	Local Govt	HACC
Cooma	Case Management	Local Govt	HACC
Cooma	Community nursing	Health	HACC
Cooma	Meal services	Local Govt	HACC
Cooma	Respite services	NGO	HACC
Eurobodalla	Aboriginal Specific	NGO	HACC
Eurobodalla	Aboriginal Specific	NGO	HACC
Eurobodalla	Case Management	NGO	Disability
Eurobodalla	Meal services	NGO	HACC
Eurobodalla	Respite services	NGO	Disability
Goulburn	CACP	NGO	Commonwealth
Goulburn	Case Management	NGO	Disability
Goulburn	Case Management	NGO	HACC
Goulburn	Home Care Services	DADHC	HACC
Palerang	Community Nursing	Health	HACC
Palerang	MPS	Health	HACC
Queanbeyan	Aged Services	Health	HACC
Queanbeyan	Case Management	Local Govt	HACC
Queanbeyan	Community Nursing	Health	HACC
Queanbeyan	Day programs	Local Govt	Commonwealth
Queanbeyan	Dementia Respite	Local Govt	Commonwealth
Region	Information	NGO	HACC
Region	Information	NGO	HACC
Snowy River	CACP	Local Govt	Commonwealth
Snowy River	Case Management	Local Govt	HACC
Snowy River	MSO	Local Govt	HACC
U- Lachlan	Community Based services	Health	HACC
U-Lachlan	Community Nursing	Health	HACC
Young	CACP	Health	Commonwealth
Young	Day Care	Health	HACC

- **Financial Results**

- Diploma Case management

▪ Income-	Grant	\$9767
	Fees	\$13690
	TOTAL	\$23457

66% of this budget went towards the delivery of 14 days of face to face training marking and evaluation of participants work. The rest of the budget met the venue hire and catering costs

The cost for participants for the Diploma was

- HACC funded services \$300
- Non-HACC funded services \$660

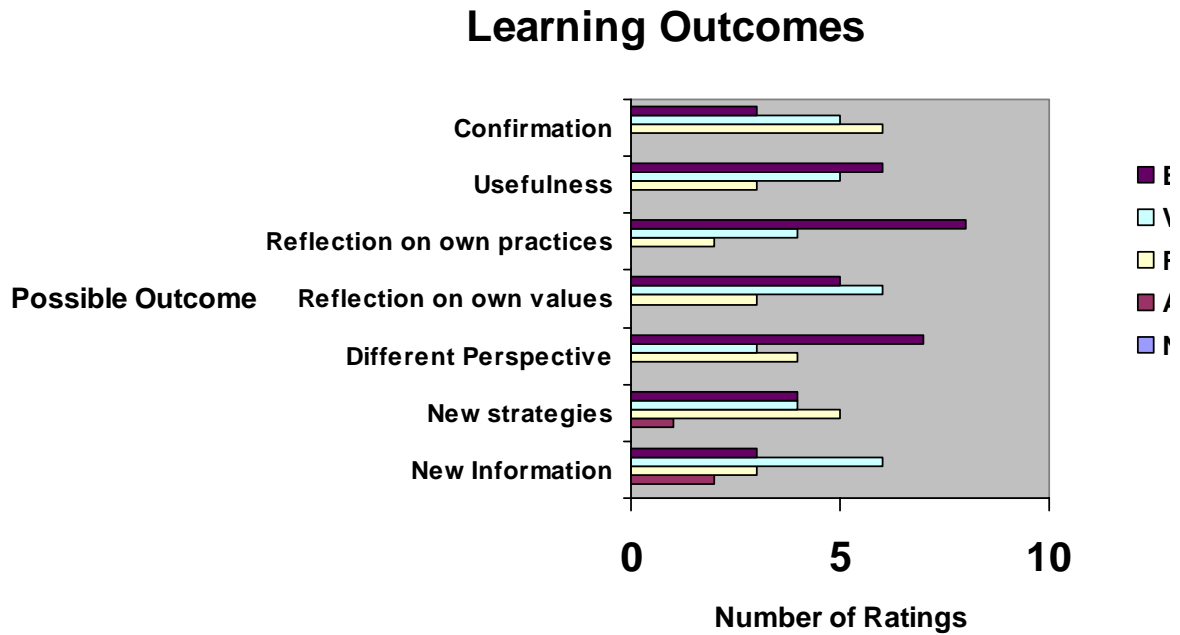
In total for the \$25,000 provided by the Department Ageing Disability and Home Care

28 days of training were provided to service providers in the Southern Region.

- **Networks**

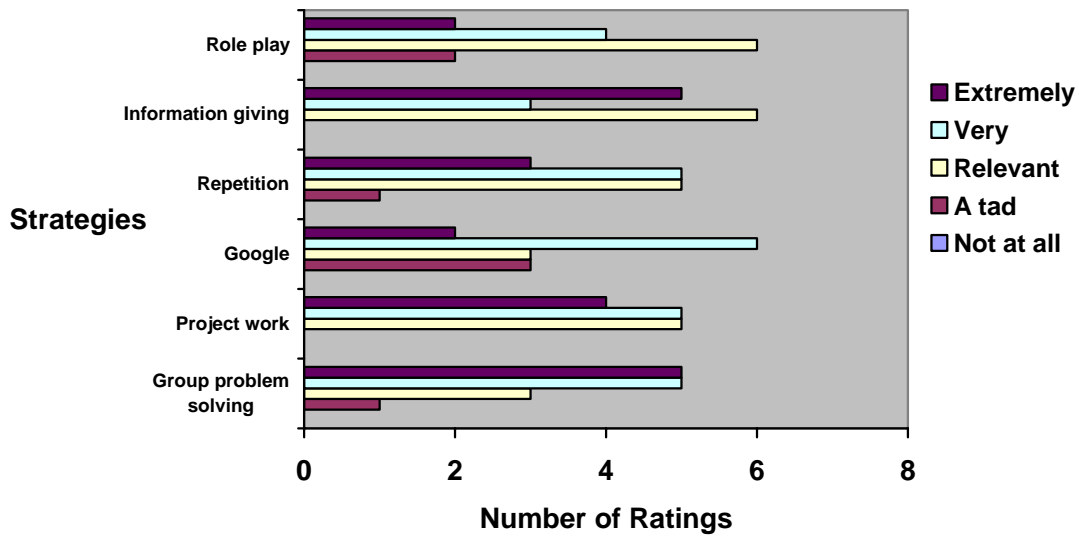
- By products of the Case Management Training included:
 - Improved understanding of roles of differently funded services
 - Improved relationships between services
 - Trust between providers
 - Mentoring between peers
 - Improved referral practices between agencies
 - Electronic networking continuing to happen between participants and a desire expressed to expand Google groups to include other service providers
- **Preparedness for change**
 - Through study and input into the “Case Management Review” and “The Commonwealth Community Care Review” participants have an increased awareness of State and Federal agendas for the community care industry. As changes and reforms are implemented participants will be prepared and equipped to manage these changes...
 - The cross fertilisation between participants from different programs enabled a less restrictive notion of “Case Management” and allowed an improved understanding of each other’s role.
- **Written Resource**
 - Three written resources were generated during the training. Two of these resources consist of a collation of the work completed by the group:
 - Case Management Best Practice; and
 - Safety Plans for Community Services.
 - The third resource is a template for planning with clients.
- **Increased Understanding of Case Management**
 - At the beginning of the training many people came with the expectation that they would be given the “answers” about case management. This didn’t happen.
 - The picture about case management evolved throughout the entire training period and with the value of creating an understanding from a range of perspectives.
 - The Google based exercise provided an opportunity to focus in on that learning and share and explore different perspectives.
- **Course Evaluation and Conclusion**
 - A final evaluation explored learning outcomes, relevance and training strategies.
 - The possible learning outcomes were rated between 1 – 5 as it applied to the individual’s experience
 - 1 = not at all relevant
 - 2 = just a tad relevant
 - 3 = relevant
 - 4 = very relevant
 - 5 = extremely relevant
 - The results indicate highest relevance for
 - Reflection on own practices
 - Exposure to different perspectives
 - Usefulness
 - Reflection on own values

- The results show two items that received a negative rating
 - New strategies
 - New information



- The effectiveness of training strategies was rated on the same 1-5 scale.
- Group problem solving, information giving and project work rated the highest number of extreme relevance ratings.
- Google, role play, group problem solving and repetition recorded negative ratings.
- Project work and information giving recorded no negative rating.
- Additional extreme relevance was noted for one response nominating the variety of training formats, and one nominating networking.
- An additional comment was *“The training system was extremely good, making all participate. Great interaction and assisted building networks that may not normally be built eg hospital staff and HACC services.”*

Training Strategies



- In addition to this, comment on the most relevant part of the course included;
 - *Impacted on better achievement of outcomes for our clients, created a more open planning environment between coordinators and other service providers*
 - *Reflection on my values because you don't realise how own values can affect the way we work, how people view us and how it can affect the way we interpret.*
 - *Case study stuff – seeing how “simple” clients can get quite complex.*
 - *Google process – good to get a feel of where others are at and being able to put own skills/knowledge/practices into place.*
 - *To be creative when looking and planning solutions and look at each person individually. To have confidence in own skills.*
 - *Google group – interesting reading other's views, experiences, philosophies etc.*
 - *Elements of case management. It clarified the process and broke case management into achievable realistic components.*
 - *Steps of case management and skills required eg negotiation.*
 - *Learning and finding a new way of approaching case management.*
 - *Assess and deliver services to clients with complex needs.*
 - *Gleaning information from other people/organisations within the course.*

- *Information sharing – coming together frequently to continue to share. The different perspectives gleaned.*
 - *Laws of Leadership. Lead and develop others*
 - *Group problem solving, team work. Respond holistically to client needs.*
 - Comments on the most irrelevant part of the course included;
 - *Lead and develop others (although I enjoyed it).*
 - *OH&S – have been doing it for quite a while.*
 - *Reflect and improve professional practice – I found it repetitive.*
 - *Part 1 of Google.*
 - *I started to get confused with some sessions because I couldn't find how this part reflected on case management. However, case management is so broad it takes a while for it to connect.*
 - Comments on the most challenging part of the course included;
 - *Finding enough time to interact on Google which was interesting, but very time consuming. Would like the site kept open for future discussions.*
 - *Google and participating as a group – unsure of using Google. However, now I'm an expert.*
 - *Google process – to feel I could participate in a non-judgemental environment.*
 - *The time management for Google.*
 - *Part 1 of Google.*
 - *The Google course – its hard doing it on-line, without direction of the teacher.*
 - *The Google and how to start assignments using Google.*
 - *Google – only because of the sheer bulk of information coming at you.*
 - *Motivation to attend Google interaction. Also I do not have access to internet at work – all Google was attended during my own time.*
 - *Starting out in Google.*
 - *The Google study group – I found it very difficult trying to cross reference comments and explain my point of view, and express my issues.*
 - *The first Google group, having to work independently without discussion. The second Google part was easier when I teamed up with other service providers and listening to their point of view.*
 - *Reflect and Improve upon Professional Practice – time taken to do assignments.*
 - *Meeting homework deadlines amongst workload.*
 - *Project management.*
 - *Getting my head around what case management was really about – changing the way I perceived case management to be.*
- **Conclusion**
 - With a bit of creativity quality training can be achieved within a small budget.
 - With a bit of creativity geographical boundaries can be overcome.

- Finding options outside serial unit of competency delivery and assessment results in a powerful and accessible learning opportunity.
- People's existing skills and experience are valuable learning tools.
- Facilitation that assists people to find their own solutions is a powerful learning tool.

Biography

Jacque Ford

- Provider of training in the Health and Community Sectors
- Delivery of nationally recognised training (across 84 units of competency) from HLT02 Health Training Package and CHC02 Community Services Package
- 30 years experience in the Disability Sector

Helen Becker

- Regional HACC (Home and Community Care) Development Officer based in Queanbeyan Council and funded to provide support to HACC funded services across 13 LGA's in Southern New South Wales (6 years)
- Manager and Co-ordinator Home Care Services NSW Crookwell and Bowral (22 years)
- Diploma Business Administration – Deakin University

Audio Visual Requirements

Please indicate your audio visual requirements

Data projection – please email your presentation to sally.vanderfield@cshisc.com.au by the **27th May 2005**

Overhead projection

Video projection

Other

If you have any questions, please do not hesitate to contact Sally Vanderfield on sally.vanderfield@cshisc.com.au or 02 9263 3591

	No Days	Units
Session 1/2	2	CHCCM3B CHCCM4B CHCNET4A
Session 3	1	CHCORG6B CHCORG9B CHCORG11B BSBMGT609A
Session 4	2	CHCCOM3C CHCC402A CHCCS6B CHCCS7C CHCCW13B
Session 5	1	CHCCD14B
Session 6	Google	CHCORG28A
Session 7	1	CHCOHS401A CHCINF5B