



Support Providers - Creating Clarity

A WAIS resource pack to support organisations to create clarity about their purpose, value and offer to people, families and employees.

Includes:

- Overview information
- Workshop session plans
- Materials / Templates

WAIS Resource Pack
Sector Development

Support Providers - Creating Clarity

Overview Information

Introduction - why this, why now?

In our ever-changing context in Human Services, WAIS has often been asked to support organisations to assist them to take stock of their current work and create clarity (or a position) on who they are, who they want to be in the future and what they may offer to people and families going forward.

Although there are many ways to do this, in partnership with support providers in Western Australia we have used and adapted a specific process taken from Patrick Lencioni's work in supporting overall Organisational Health¹.

Many organisations consistently review and at times redefine their values and core purpose to assist them to clarify what this means for their future strategy and potential position in our communities.

This process enables two key aspects including:

1. The **co-production** of defining and clarifying who the organisation is, involving people, families, employees and leaders
2. **Clarity and transparency** for everyone involved in the organisation to understand the strengths and areas of development for the organisation

The outcome of this approach includes;

- Clarity on the core purpose of the organisation
- Clarity on the values of the organisation
- Ability to define what the organisation does and how it works to achieve the core purpose
- Strategic direction based on the positioning of the organisation

¹ The Advantage, Patrick Lencioni

Methodology - What does the process look like?

The methodology we propose to use follows a co-productive approach drawing on a range of people connected to the organisation.

Tasks involved include:

- 1) Creating a small working group to carry out the work - we recommend a team of four, including a person who currently receives support, become familiar with the process by reading this resource. (If the group want more detail and understanding of the broader process, read P. Lencioni – The Advantage in creating Organisational Health)
- 2) Use the Organisational Health Check power point slides presenting the overview of the process as covered in this resource
- 3) Create a schedule of workshops and gatherings to host conversations to gain feedback around specific questions with people and families, support teams, back office teams and the leadership team
- 4) Host conversations – hear everyone’s perspectives
- 5) Collect all the feedback and develop a Creating Clarity draft playbook (a simple book that outlines who the organisation is) for the organisation to explore
- 6) Share and agree final draft with leadership team
- 7) Share the work with those who took part in the project and any new colleagues

Considerations – Things to think about

As the approach is founded on the principles of co-production, we want to point out some areas of consideration.

‘Co-production = Co Means ‘together’ or ‘with’ and **Produce** Means to make something or bring something into existence’

When WAIS uses the term ‘co-production’ we mean how organisations designed to serve people, work together with people and families in a genuine partnership to design and deliver supports and services. Never has the need been greater for organisations to find ways to really work in partnership with people and families as now.

The National Disability Insurance Scheme (NDIS) and Consumer Directed Care (CDC) are radically changing the way that people can secure resources and purchase supports and services – but these supports and services need to be what people actually want. The only way to design services and supports that people really want, is to listen to these experts (people and families) and work in partnership. We believe organisations who aim to co-design get better results in the end.

However, as we consult with partners across the organisation including people, families and the wider workforce, areas of development may arise that may not relate directly to the Creating Clarity work, but may typically include:

- the gaps between the perceived and actual customer experience
- areas where the customer experience can be enhanced and improved i.e. “pain points’
- discovering existing practices and processes that positively and negatively impact on the customer experience

This is all great learning for any organisation and should be heard within the process.

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Overview of the Process

Stage of the process	Facilitator Guidance / Support
<p>1) Creating a small working group to carry out the work, we recommend a team of four including a person who currently receives support – become familiar with the process by reading this resource.</p>	<p>Start as you mean to go on – the working group needs to reflect a range of different perspectives – lived experience, delivery of services, leadership and back office.</p> <p>Share the resource, the session plans and the power point slides so that all members can become familiar with the process.</p>
<p>2) Use the Organisational Health Check power point slides presenting the overview of the process as covered in this resource.</p>	<p>Working group get familiar with the power point slides and the process – agree who will lead each section?</p>
<p>3) Create a schedule of workshops and gatherings to host conversations to gain feedback around the specific questions in the power point with people and families, support teams, back office teams and the leadership team.</p>	<p>Arrange sessions at times that will work for each stakeholder group. Invitation needs to include an overview of the process and why the organisation is asking for their input.</p>
<p>4) Host conversations / gatherings – hear everyone’s perspectives.</p>	<p>Facilitate sessions – about 2 hours per session. Work through the process – capturing the views and feedback on flip chart paper</p>

Stage of the process cont.	Facilitator Guidance / Support cont.
5) Collect all the feedback and develop a Creating Clarity Draft for the organisation to explore.	Draw all the info into the template provided – Draft play book.
6) Share and agree final draft with leadership team.	Explore the Draft Playbook with the Leadership Team and gain agreement. Finalise Play Book.
7) Share the work with those who participated in the project and any new colleagues.	Distribute the final play book and actions.

Support Providers - Creating Clarity Materials

- Workshop Session Plan
- Collating the Information Template
- Draft Playbook Template
- Creating Clarity power point slides

Workshop Session plan

Aim of sessions: To host conversations with people from across the Organisation to generate feedback to inform the draft play book

Time of session: 2.30 mins approximately

Time	Stage	Method	Resources needed
10 mins	Welcome and introductions	Small groups – introduce yourself	Creating Clarity slides 2 & 3
10 mins	Overview – why this, why now? The process comes from a broader process designed by Patrick Lencioni and has been adapted by WAIS	Presentation	Creating Clarity slides 2 & 3
5 mins	Overview of the Creating Clarity Process – the 7 questions which we will explore in this session	Presentation	Creating Clarity slides 4
15 mins	1. Why this, why now? Group share their feedback	Group Exercise – on flip chart paper – explore and make a note of the four quadrants (no science – just perspective)	Creating Clarity slides 5 Flip chart paper and pens

Time	Stage	Method	Resources needed
15 mins	<p>2. Why does this Organisation exist?</p> <p>Group share their feedback</p> <p>Look for similarities / big differences</p>	Group Exercise – on flip chart – explore and answer the question	Creating Clarity slides 6 Flip chart paper and pens
15 mins	<p>3. How do we behave?</p> <p>a. Explain that there are different kinds of values in organisations, as an example, include sharing</p> <p>b. How do we behave?</p>	<p>Presentation</p> <p>Group Exercise – on flip chart – explore and answer the question</p>	<p>Creating Clarity slides 7, 8 & 9</p> <p>Creating Clarity slides 10</p>
20 mins	<p>4. What do we do?</p> <p>a. Explain what we are looking for by using the examples</p> <p>b. Ask the groups to develop their statement</p> <p>c. Ask the groups – do their statements offer crystal clear clarity – rewrite if not</p> <p>d. Group share their feedback</p> <p>e. Look for similarities / big differences</p>	<p>Presentation</p> <p>Group Exercise – on flip chart – explore and answer the question</p>	<p>Creating Clarity slides 11</p> <p>Creating Clarity slides 12</p>

Time	Stage	Method	Resources needed
20 mins	<p>5. How will we succeed?</p> <ul style="list-style-type: none"> a. Explain what this exercise will lead to – some clear decision-making filters by using the examples b. Exercise – jot down all the things that make up the organisation including services, attitudes, culture, regular mantras said by people. Get it all down c. Ask the groups to theme all of their info into big headings – these are the main themes d. Ask the group to turn their top 3 themes into questions – decision making filter questions <p>Group share their feedback</p> <p>Look for similarities / big differences</p>	<p>Presentation</p> <p>Group Exercise – on flip chart – explore and answer the question</p>	<p>Creating Clarity slides 13, 14, 15, 16 and 17</p>

Time	Stage	Method	Resources needed
10 mins	<p>6. What is important right now?</p> <p>This is simple – looking at all the themes, what do the group think is important right now?</p>	<p>Large group discussion</p> <p>Jot down the highest priority areas</p>	<p>Creating Clarity slides 18</p>
10 mins	<p>7. Who must do what and when?</p> <p>Ask the group to suggest no more than 3 actions they would like to see from all that they have discovered together</p>	<p>Large group discussion</p> <p>Jot down the highest priority areas</p>	<p>Creating Clarity slides 19</p>
5 mins	<p>Round up and finish</p> <p>Thank the group for their contribution and explain next steps – a draft play book will be developed</p>	<p>Presentation</p>	<p>Creating Clarity slides 20</p>

Collating the Information Template

Critical questions	Sample Comments that came from the workshops
<p>1. Why this, why now?</p>	<p>Summary of group perspective related to the four quadrants exercise</p>
<p>2. Why (name of the organisation) exist? (name of the organisation) Core purpose</p> <p><i>‘Successful organisations understand the fundamental reason they exist and stay true to that reason, it helps them not lose their way’.</i> Collins & Porras, <i>Built to Last</i>, 2002</p> <p><i>‘Why we exist – needs to be idealistic, so that employees at every level in the organisation know that at the heart of what they do lies something grand and aspirational.’</i> Lencioni</p>	<p>Examples may include:</p> <ul style="list-style-type: none"> ● To help people have a quality life ● To make life easier. ● To give people connection and to be included. ● We like to help and support people ● To have a better life ● We work on whatever the person wants to achieve.

Critical questions cont.	Sample Comments that came from the workshops
<p>3. How does (name of the organisation) behave? (name of the organisation) Values</p> <p><i>‘Clear values not only create clarity for employees, it also attracts and repels customers who want to partner with your organisations’</i></p>	<p>Examples may include:</p> <p>Aspirational Values – characteristics an organisation wants to have and wants to develop.</p> <ul style="list-style-type: none"> ● Excellent communicators <p>Permission to play values – these minimum standards that are required in an organisation.</p> <ul style="list-style-type: none"> ● Respect for people, their family and home ● Duty of Care <p>Accidental Values – these exist unintentionally</p> <ul style="list-style-type: none"> ● It’s about our billable time <p>Core Values lie at the heart of the organisation’s identity, do not change over time, and must already exist.</p> <ul style="list-style-type: none"> ● We care ● We can be trusted
<p>4. What does (name of the organisation) do? - Establishing market position</p> <p><i>‘The what we do is critical and straightforward’.</i></p>	<p>Examples may include:</p> <ul style="list-style-type: none"> ● In home ● Community supports

Critical questions cont.	Sample Comments that came from the workshops
<p>5. How will (name of the organisation) succeed? - Decision anchors</p> <p><i>'Strategic anchors provide the context for all decision making'</i></p>	<p>Examples may include:</p> <p>Will this decision help to;</p> <ul style="list-style-type: none"> ● Build our community? ● Invest in our staff? ● Improve the wellbeing of the people we support?
<p>6. What is important right now? - Priorities</p> <p><i>'The thematic goal, the rally cry'</i></p>	<p>Examples may include:</p> <p>If we could accomplish 1 thing over the next year - what would it be?</p> <p>Flexibility - more choice of days and hours that the person wants</p>
<p>7. Who must do what? - Action</p>	<p>List the three actions agreed by the group to be the priority actions,</p>

Draft Playbook Template

Stage	Our draft statements
1. Why this, why now?	
2. Why do we exist?	<p>Why:</p> <p>For who:</p>
3. How do we behave?	<p>Core Values:</p> <p>Aspirational Values:</p> <p>Accidental Values:</p> <p>Permission to play:</p>
4. What do we do?	<p>We provide / we work in partnership to provide...</p>

Stage cont.	Our draft statements cont.
<p>5. How will we succeed?</p>	<p>Our decision making is influenced by these 3 Strategic Anchors:</p> <ol style="list-style-type: none"> 1. 2. 3.
<p>6. What is most important right now?</p>	<p>Our priorities right now are...</p>
<p>7. Who must do what?</p>	<p>We will focus on the following actions...</p>

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